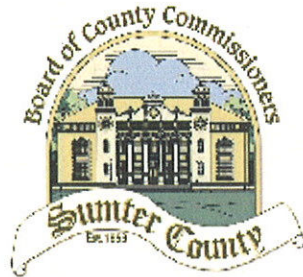


REQUEST FOR PROPOSAL
SUMTER COUNTY ECONOMIC DEVELOPMENT
MARKETING AND PROGRAM SUPPORT

RFP # E1-2099/AT



ORIGINAL

SUBMITTED TO:

Amanda Taylor
Purchasing Coordinator
Sumter County
910 N. Main Street
Bushnell, Florida 33513

Due Date: September 18, 2009

SUBMITTED BY:

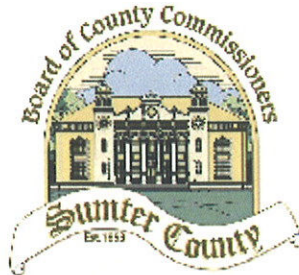


Strategic Planning Group, Inc.

818 N A1A, Ste 303
Ponte Vedra Beach, FL 32082
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Phone (904) 339-0150 Fax (904) 339-0151
www.spginc.org

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Economics • Planning • Development Consultants

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STRATEGIC PLANNING GROUP, INC.
ECONOMICS · PLANNING · DEVELOPMENT CONSULTANTS

ROBERT J. GRAY, CHAIRMAN & PRESIDENT
USA, JAMAICA, GUAM, VIRGIN ISLANDS, CHINA

September 18, 2009

Ms. Amanda Taylor
Purchasing Coordinator
Sumter County
910 N. Main Street
Bushnell, Florida 33513

RE: RFP #E1-2009/AT

Dear Ms. Taylor:

Strategic Planning Group, Inc. ("SPG"), a Florida based economic development enterprise, is pleased to submit our qualifications to assist Sumter County in its economic development efforts. SPG is uniquely qualified to assist the County for a host of reasons:

Economic Development Experience - SPG is a national leader in assisting over 60 government organizations create and implement economic development programs, of which over 30 were developed for Florida clients. In fact, we are one of the few consulting organizations that have successfully prepared Economic Development Programs that serve as optional elements or, in certain cases, served as back-up to Comprehensive Plans. We are also site relocators, assisting industry in finding new sites for relocation or expansion.

Economic Development Experience



We are familiar with Sumter County having prepared several studies in the area. In the late 1980s we prepared the *Withlacoochee Regional Industrial Targeting Study, Florida* which included Sumter County. SPG recently completed the following successful Economic Development Programs: *Deltona Economic Development Strategic Plan*; *Ormond Beach Economic Development Strategic Plan*; and the *Southern*



Titusville Economic Development Initiative all of which were unanimously approved. Also, we produced the Volusia County (Florida) Economic Development Program which was not only unanimously adopted, but also fully funded (\$100 million effort). Other successful plans include The First Coast Economic Development and Target Study (Jacksonville, which led to Duval County's significant growth in the 1990s). More detailed experience is shown in our Past Performance section.

Staff Experience – SPG key staff are active in both the Florida Economic Development Council (FEDC) and the Florida Redevelopment Association. Mr. Gray, AICP served on the FEDC Board as well as the Economic Development Boards for three Florida Mayors. He has extensive management experience, public and private. He has served as a County Planning Director, and City Planner. During the late 1990s, he served as interim Planning Director for Nassau County. **Mr. Michael Plummer** prior to joining SPG served as the Southeast Regional Director of Real Estate and Financial Management Consulting for KPMG Peat Marwick. Mr. Plummer served on the Firm's Real Estate Steering Committee and participated as an instructor in KPMG's in-house training programs. He served on Governor Bob Graham's Council of Economic Advisors, the Florida Governor's Task Force on Housing, as well as an Economic Advisor to the Atlanta Committee for the Olympic Games. **Mr. Mondae** has over 30 years experience as project director and principal consultant on a wide variety of economic development studies, real estate development projects, land uses, Vision/strategic planning, and economic revitalization, including recreational facilities, industrial parks, tourism development, hotels, new communities, retail projects, corporate real estate development and local, state and federal government projects.

SPG, in association with IBI, is assisting Pasco County's Growth Management Department in its day-to-day planning activities (augmenting its existing staff) especially in its Economic Development efforts..

Location – SPG is located within a easy compute and if selected will not charge for mileage or travel time between our office and the County.

Business and Financial Resources – SPG is a Florida licensed corporation with over 25 years of corporate experience. We have the proven experience and resources to ensure the completion of the effort.

The following sections of this submittal should provide the County with a good understanding of our corporate and staff experience.

In conclusion, SPG looks forward to the opportunity of working with the County in its economic development efforts. We understand the global and local issues related to economic development, yet we also understand the real world (political and business) of smaller communities. We feel we can bring to you proven and implementable management solutions. We certify that SPG has sufficient resources in terms of personnel, equipment, and time to commit to this project. Should you have any questions on this qualification statement or our work examples, please do not hesitate to contact me.

Respectfully submitted,
Strategic Planning Group, Inc.

Robert J. Gray, AICP
Chairman and President



WHY STRATEGIC PLANNING GROUP?

EXPERIENCE:

Economic Development Programs

Assisted over 60 communities internationally, as well as numerous regional and local jurisdictions, develop effective Economic Development Programs. Recent experience includes Deltona and Titusville.

EXPERIENCE:

Corporate Site Selector/Relocator

One of a small number of site relocation firms assisting industry in screening potential relocation or expansion sites, negotiating with local governments on preparing incentive packages and coordinating permitting and brokerage efforts.

EXPERIENCE:

Site Specific Market Research

Area-specific planning – SPG has conducted feasibility studies for over 100 million square feet of commercial/industrial space, along with relocation studies for corporate and back-office clients.

EXPERIENCE:

National Leader in VISIONing and Consensus Making

SPG has successfully used visioning and charrettes in the development of successful economic development strategies and business plans for communities worldwide.

EXPERIENCE:

Successful Implementation -- New Jobs and Capital Investment to Communities

SPG has been responsible for over 60,000 jobs/\$5 billion capital investment.



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TAB 1

Corporate Background
and Capabilities

Project Experience

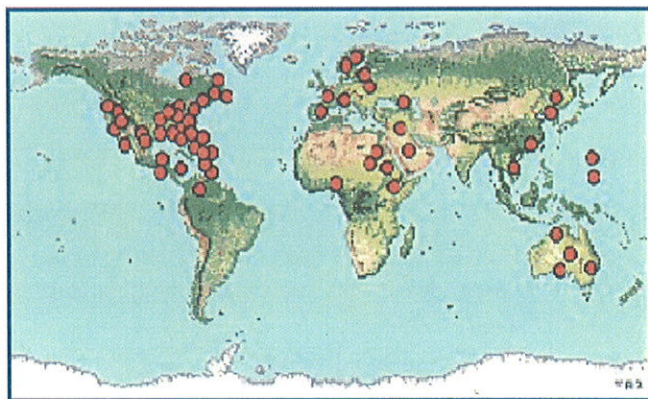


Capabilities of the Firm

BACKGROUND INFORMATION

Strategic Planning Group, Inc. (SPG) is highly qualified to provide the necessary redevelopment expertise needed to assist Sumter County in its Economic Development Process. As evidence, we submit the enclosed statement of qualifications and experience.

SPG, a Florida based economic development, economics and planning consulting firm, was founded in 1983. The core of our practice is the implementation of economically viable developments—public or private. Increasingly, **SPG's** role is to act as the client's representative assisting in the coordination of the various disciplines associated with economic development; comprehensive land-use planning, environmental assessments, engineering, permitting, design and construction, financing and management, and market research.



The fields of economic development and redevelopment planning have changed significantly over the last decade. Today, available workforce skills, the capital market, international competition, environmental regulations, workforce housing and permitting have added significant costs and time to the development process. **SPG** is a pioneer in the use of strategic planning concepts in developing solutions to enhancing the economic development potential of local governments. *We are one of the first consulting organizations to successfully merge the fields of economic development, growth management, land*

development regulations, economic development and development economic consulting. Perhaps, most importantly, we are internationally known for forging public/private partnerships and developing public consensus.

At the heart of all our studies is the belief that, in order to succeed, planning must be based on sound economic and market principles and have solid stakeholder involvement throughout the entire planning and implementation process.

Since 1983, we have continuously provided professional economic development, commercial/industrial land-use planning, and market feasibility services to local government entities throughout the Southeast. Our firm is committed to providing the highest quality of professional services to our clients. The success of this philosophy is evidenced by our clients satisfaction with the services we provide.

Certificate of Status

I certify from the records of this office that STRATEGIC PLANNING GROUP, INC. is a corporation organized under the laws of the State of Florida, filed on November 21, 1983.

The document number of this corporation is G72058.

I further certify that said corporation has paid all fees due this office through December 31, 2009, that its most recent annual report/uniform business report was filed on February 23, 2009, and its status is active.

I further certify that said corporation has not filed Articles of Dissolution.

I further certify that this is an electronically transmitted certificate authorized by section 15.16, Florida Statutes, and authenticated by this code, 090224001138-200144200512#1.

Given under my hand and the Great Seal of the State of Florida at Tallahassee, the Capital, this the Twenty Fourth day of February, 2009.



Kurt S. Browning
Kurt S. Browning
Secretary of State



CONSULTING SERVICES

SPG's consultant team assists our public- and private-sector clients to maximize profits and minimize costs, while improving the quality of their investment. Our services include:

Economic Development

- ◆ Site Selection Services
- ◆ Economic Targeting
- ◆ Workforce Development
- ◆ Incentive Planning
- ◆ Strategic Plan Development
- ◆ Economic Development Strategies
- ◆ Community Development

Planning Studies

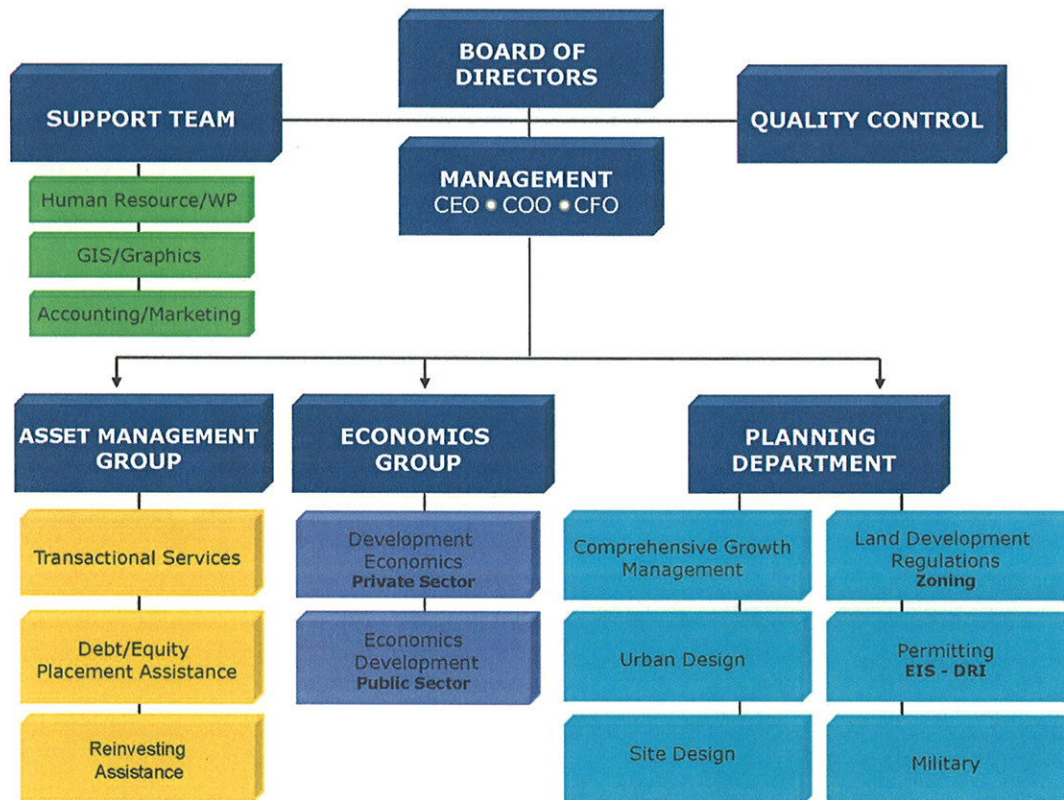
- ◆ Revitalization Plans
- ◆ Long-Range Comprehensive Plans
- ◆ Land Development Regulations
- ◆ Downtown Master Plans
- ◆ Affordable and Workforce Housing
- ◆ Tourism Planning
- ◆ Capital Improvement Programs

Market and Economic Studies

- ◆ Development Economics
- ◆ Market Assessments
- ◆ Market Feasibility Studies
- ◆ Absorption and Pricing Studies
- ◆ Development Planning and Permitting
- ◆ Highest- and Best-Use Studies
- ◆ Investment Analysis
- ◆ Economic and Fiscal Impact
- ◆ Integrated Economic Analyses

Strategic Planning

- ◆ Social and Economic Development
- ◆ Environmental Analysis and Mediation
- ◆ Consensus Planning & Implementation Strategies
- ◆ Public Policy





Capabilities of the Firm

The following graphic illustrates SPG's economic development experience in the State of Florida alone.

Economic Development Experience



SPG is a leader in Economic Development assisting both the public and private sector to develop relocation plans and incentive programs. SPG staff have served on numerous Economic Development Councils and Agencies to aid with the implementation of numerous Economic Development Plans.

Our Other Experience Includes:

Georgia

Atlanta Olympic Committee
Camden County
City of Conyers/
Rockdale County
Hall County
Hinesville
Kingsland
Rome

Alabama

Autauga County
Baldwin County
Calhoun County
Chilton County
Coosa River County
Elmore County
Etowah County
Mobile County
Montgomery County
St. Claire County
Shelby County
Talladega County

Michigan

Washtenaw
Lake Michigan
Development
Commission

California

Palmdale
LA Airport Authority

Louisiana

Covington
Lake Charles

Mississippi

Biloxi
Pascagoula

North Carolina

Washington

Texas

Corpus Christi
Dayton
Galveston
Ingleside

International

Alice Springs, Australia
Arab Republic of Egypt
Curacao, The
Darwin, Australia
Islands
Jamaica, Kingston
St. Croix, Virgin Islands
St. Johns, Virgin Islands
St. Thomas, Virgin
Trinidad & Tobago



CORPORATE AND INDUSTRIAL DEVELOPMENT

SPG's Corporate and Industrial Real Estate Economics and Management Program has been designed to assist firms in organizing and planning for maximizing the benefits of facility and real estate assets. These services are ideally suited for municipalities, corporations, industrial development organizations, major land owners, developers of commercial real estate, financial and medical institutions.

SPG also provides a broad range of economic and industrial development services for public agencies, local/regional state government and development organizations both within the U.S. and overseas.

CORPORATE/INDUSTRIAL SERVICES

Economic/Industrial Development

- ◆ Enterprise Zones
- ◆ Target Industry Studies
- ◆ Incentives Programming
- ◆ Economic Base Analysis
- ◆ Industry Recruitment
- ◆ Promotions/Marketing
- ◆ Funding Strategies

Corporate and Institutional Planning

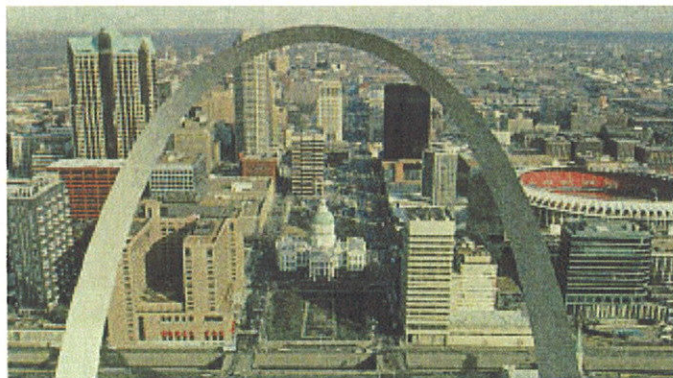
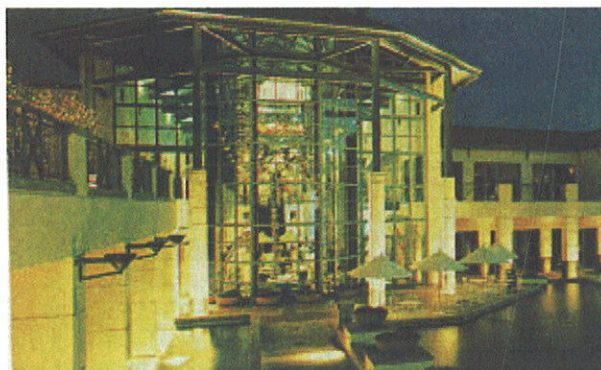
- ◆ Market and Branch Analysis
- ◆ Space Utilization Programming
- ◆ Feasibility Studies
- ◆ Tenant Representation
- ◆ Property and Facility Asset Management
- ◆ Lease Evaluation/Structuring
- ◆ Investment/Management Advisory
- ◆ Property Records Systems

Strategic Planning

- ◆ Market Research
- ◆ Economic Base Analysis
- ◆ Target Industry Studies
- ◆ Development Strategies
- ◆ Property Records Systems
- ◆ Branching Strategy Programs
- ◆ Real Estate and Property Utilization Analysis

Real Estate Development

- ◆ Site Selection
- ◆ Development Planning
- ◆ Project Marketing—PR
- ◆ Market Overviews/Analysis
- ◆ Impact Assessments
- ◆ Market Evaluations
- ◆ Concept/Programming

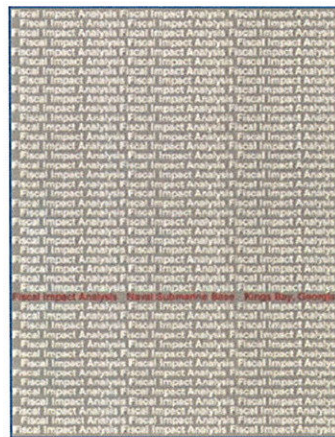
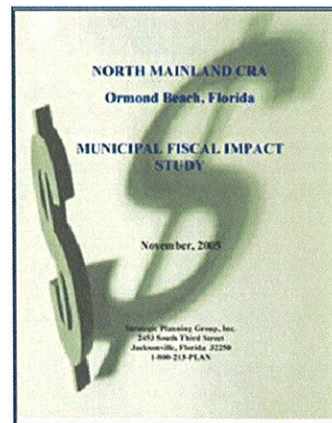
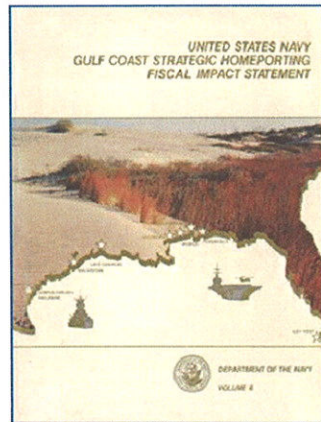




ECONOMIC/FISCAL IMPACT STUDIES

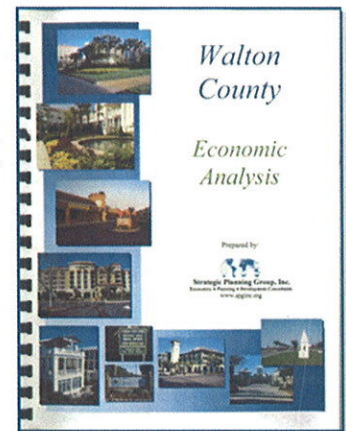
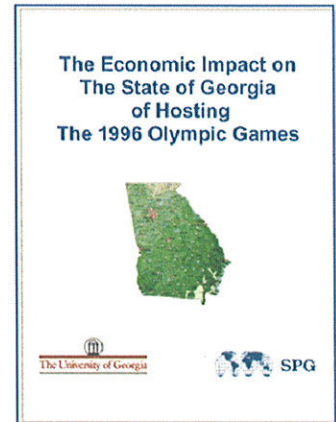
Florida

Duval County
Escambia County
Flagler County
Hernando County
Monroe County
Nassau County
Santa Rosa County
Sarasota County
Volusia County
Walton County
Jacksonville
Key West
North Port
Ormond Beach
Palm Coast
Pensacola
Titusville
Ormond Beach



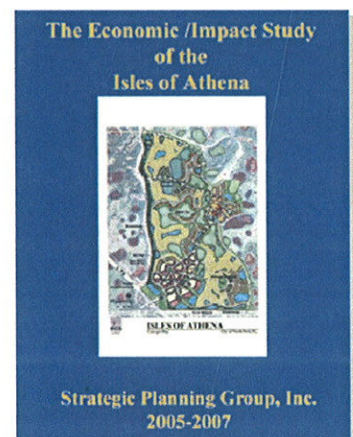
United States

Baldwin County, AL
Camden County, GA
Fulton County, GA
DeKalb County, GA
Glynn County, GA
Jackson County, MS
Lake Charles, LA
Mobile County, AL
Nueces County, TX
Rockdale County, GA
San Patricio County, TX
Corpus Christie, TX
Galveston, TX
Gulfport, MS
Mobile, AL
Pascagoula, MS



International

Australia
Bahamas
Curacao
Trinidad/Tobago
US Virgin Islands
Egypt
Guam
Jamaica





Capabilities of the Firm

| SPG Project Experience Summary | | | | | | | | | | | | | | | |
|--|---------------------|------------------------------|----------------------|----------------------------------|-----------------------|-------------------------------|---------------|--------------------|------------------------|--------------------|------------------|---------|--------------|--------------------|-------------------------------|
| Economics • Planning • Development Consultants | | | | | | | | | | | | | | | |
| FLORIDA CLIENTS County & Local Government | Market and Analysis | Redevelopment/Revitalization | Economic Development | Urban/Growth Management Planning | Fiscal Analysis - CIP | Tax Increment Financing (TIF) | Housing Study | Affordable Housing | Commercial Feasibility | Retail Feasibility | Recreation Study | Tourism | Demographics | Strategic Planning | Site Selection and Evaluation |
| | | | | | | | | | | | | | | | |
| Apopka | | X | | | | | | | | | | | | | |
| Boca Raton | X | | | | | | | | | | | | | | |
| Boynton Beach | X | X | | | X | X | X | X | | | | | X | X | |
| Bradenton | X | X | | | | | | | | | | | | | |
| Brevard County | | X | X | | | | | | | | | X | X | | |
| Citrus County | | | X | | | | | | | | | | | | |
| Clay County | | | X | X | | | X | | | | X | | | | |
| Cocoa | X | X | X | X | | X | X | X | X | X | | | X | X | X |
| Coconut Creek | | | | | | X | | | | | | | | | |
| Daytona Beach Shores | | X | X | | | X | X | X | | | X | | | | |
| Deland | X | X | X | | X | | | | X | X | | | | | |
| Delray Beach | X | X | | X | | X | X | X | X | X | | | X | X | |
| Deltona | | | X | | | | | | | | | | | | |
| Edgewater | | | | | | X | X | | | | | | | | |
| Fort Lauderdale | | | | | | X | X | | X | | X | X | | | |
| Fort Pierce | X | | | | | | X | | | | | | X | | |
| Fort Myers | X | X | | | | | | X | X | | X | X | | | |
| Hernando County | X | | X | | | X | X | | | | | | | | |
| Hialeah | | | X | | | | | | | | | | | | |
| Jacksonville Beach | X | X | X | X | X | X | X | X | X | X | X | | X | X | X |
| Jacksonville | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |
| Key West | X | | X | X | | X | X | | | | | | X | | |
| Levy County | | | X | | | | | | | | | | | | |
| Maitland | X | X | X | X | | | | X | X | | | | X | | |
| Marion County | | | X | | | | | | | | | | | | |
| Melbourne | X | X | X | | X | | | X | X | X | | X | | | |
| Navarre Beach | X | | X | | | | | X | X | | X | | | | |
| North Miami | X | X | X | X | | X | | X | X | | | | X | | |
| Orange County | | X | X | | | | | | | | | | | | |
| Orlando | X | X | X | X | | X | X | X | X | | | X | X | X | |
| Ormond Beach | X | X | X | X | X | X | X | X | X | | | X | X | X | |
| Palatka | | X | X | X | | | | | | | | X | X | | |
| Palm Beach County | | | | | | X | X | | | | | | | | |
| Palm Coast | X | X | X | X | X | X | X | X | X | | | X | X | | |
| Panama City | | X | X | | | | | X | X | | X | X | | | |
| Pasco County | | | X | X | | X | X | | | | | | | | |
| Pensacola | | X | X | | | | | | | | | | | | |
| Pensacola Beach | | | X | | | X | | X | X | | X | X | | | |
| Polk County | | X | X | | | | | X | | | | | | | |
| Plant City | | | | | | X | X | | | | | | | | |
| Rockledge | | X | X | | | | | X | X | | | | | | |
| Safety Harbor | X | X | X | | | X | X | X | | | | | | | |
| Springfield | | X | | | | | | | | | | | | | |
| St. Augustine | X | X | X | X | | | | X | X | | | | X | | |
| St. Cloud | | | X | | | | | | | | | | | | |
| St. Johns County | | | X | | | X | X | | | | | | | | |
| St. Petersburg | X | X | X | X | | X | X | X | X | X | | X | X | X | X |
| Sunrise | | | | | | X | | | | | | | | | |
| Sumter County | | | X | | | | | | | | | | | | |
| Tallahassee | X | X | X | X | | | X | X | X | | | | X | | |
| Tarpon Springs | X | X | X | X | | | X | X | X | | X | | | | |
| Temple Terrace | | | X | | | | X | X | | | | | | | |
| Titusville | | X | X | X | | | X | | | | | | | | |
| Vero Beach | X | X | X | | X | X | | X | X | | | | | | |
| Walton County | | | X | | | | | | | | X | X | X | | |
| Winter Haven | X | X | X | X | X | X | X | X | X | X | X | X | X | X | X |



VOLUSIA COUNTY ECONOMIC DEVELOPMENT STRATEGIC PROGRAM



**Economic
Development
Strategic Plan**

**\$100 Million Partnership in
Economic Development**

June 2002

FLORIDA

Economic Development Strategic Plan for Volusia County, Florida. The County retained SPG to update its past economic development plans in light of the creation of a new County EDO. SPG conducted over 70 face-to-face interviews, four regional charrettes throughout the County, two County workshops and a final Public Hearing on the Strategic Plan and its implementation program. The County's commitment to economic development increased from \$267,000 to \$2.1 million.

The \$100 million Implementation Plan covers six major goals: Developing and Implementing a Unified Approach to Economic Development; Business Development and Expansion; Tourism Enhancement and Expansion; Workforce Development; Community Development; and Maintaining and Enhancing the Quality of Life and Environment of Volusia County.

**VOLUSIA
COUNTY
Economic
Development
Strategic Plan**

| Objective | Strategy | Quarter | Year | CY 2002 | CY 2003 | CY 2004 | CY 2005 | CY 2006 | 5 YR total | Funding Source |
|----------------------|--|---------|------|--------------------|--------------------|--------------------|------------------|--------------------|--------------------|----------------|
| Goal 1 | DEVELOP AND IMPLEMENT A UNIFIED APPROACH TO ECONOMIC DEVELOPMENT | | | \$1,125,500 | \$1,162,500 | \$1,031,500 | \$999,500 | \$1,008,500 | \$5,315,500 | |
| Objective 1.1 | Create Base Line For Identifying Workforce Attributes | | | | | | | | | |
| Strategy 1.1.1 | Establish a routine reporting process for monitoring area workforce statistics and trends, by 3rd quarter, CY 2002; ongoing | 3 | 2 | \$2,000 | | | | | \$2,000 | DOED |
| Strategy 1.1.2 | Investigate and monitor annual population migration trends to determine local growth rates, by 2nd quarter, CY 2002; ongoing | 3 | 2 | \$2,000 | \$2,000 | \$2,000 | \$2,000 | \$2,000 | \$10,000 | DOED |
| Strategy 1.1.3 | Establish a routine reporting process for monitoring average wage trends by industry sector, by 2nd quarter, CY 2002; ongoing | 3 | 2 | \$1,000 | \$1,000 | \$1,000 | \$1,000 | \$1,000 | \$5,000 | DOED |
| Strategy 1.1.4 | Incorporate and financially support the Senior Corp Of Retired Executives (SCORE) toward providing initial small business counseling for business start-ups, beginning 2nd quarter, CY 2002; ongoing | 2 | 2 | \$5,000 | \$5,000 | \$5,000 | \$5,000 | \$5,000 | \$25,000 | DOCS DOED |
| | | | | \$10,000 | \$8,000 | \$8,000 | \$8,000 | \$8,000 | \$42,000 | |
| Objective 1.2 | Create Value-Added Employment Opportunities | | | | | | | | | |
| Strategy 1.2.1 | Identify targeted industry sectors that offer value-added employment opportunities by 3rd quarter, CY 2002; ongoing | 3 | 2 | \$25,000 | | | | | \$25,000 | DOED |
| Strategy 1.2.2 | Establish public policy to set targeted wage parameters that provide value-added guidelines by 3rd quarter CY 2002; ongoing | 3 | 2 | \$0 | \$0 | \$0 | \$0 | \$0 | \$0 | DOED |
| Strategy 1.2.3 | Establish an inducement program to encourage recruitment of value-added businesses by 3rd quarter CY 2002; ongoing | 3 | 2 | \$350,000 | \$350,000 | \$350,000 | \$350,000 | \$350,000 | \$1,750,000 | DOED |
| Strategy 1.2.4 | Support development projects that create physical facilities that foster value-added employment; ongoing | 1 | 2 | \$300,000 | \$300,000 | \$300,000 | \$300,000 | \$300,000 | \$1,500,000 | DOED LM |
| Strategy 1.2.6 | Organize and coordinate a Federal Contractor Procurement Fair to provide local access to federal small business set-a-sides by 3rd quarter CY 2003; ongoing | 4 | 3 | | | \$20,000 | | \$20,000 | \$40,000 | DOED |
| | | | | \$675,000 | \$650,000 | \$670,000 | \$650,000 | \$670,000 | \$3,315,000 | |
| Objective 1.3 | Encourage Partnering of Economic Development Activities between County, Cities and Chambers of Commerce | | | | | | | | | |
| Strategy 1.3.1 | Create a marketing forum to encourage participation of area chambers, cities and county economic development and workforce practitioners by 1st quarter CY 2002; ongoing | 2 | 2 | \$18,000 | \$5,000 | \$5,000 | \$5,000 | \$5,000 | \$38,000 | DOED |
| Strategy 1.3.2 | Encourage the participation of chamber, cities, county and workforce practitioners in targeted trade shows for business recruitment by 3rd quarter CY 2002; ongoing | 4 | 2 | \$12,000 | \$12,000 | \$12,000 | \$12,000 | \$12,000 | \$60,000 | DOED |

Strategic Planning Group, Inc.
1 800 213 PLAN

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Strategic Planning Group, Inc.
1 800 213 PLAN

Page 107



ORMOND BEACH ECONOMIC DEVELOPMENT STRATEGIC PLAN



STRATEGIC ECONOMIC DEVELOPMENT PLAN



Prepared for:

City of Ormond Beach
Economic Development Department



August 1, 2006



Submitted by:



Strategic Planning Group, Inc.
2453 South Third Street
Jacksonville Beach, FL 32250
1-800-213-PLAN - 904-339-0150
www.spginc.org

Strategic Planning Group, Inc prepared the highly successful Ormond Beach Economic Development Strategic Plan which was based on a community Vision Process to establish a five year strategic process for

Five Year Strategic ED Plan

- To serve the city as a guide for identifying key priorities in diversifying the City's Economy.
- The plan is focused on three major goals:
 - Business Retention and Expansion
 - Business Recruitment and Future Business Centers.
 - Downtown Redevelopment and Visitor Attraction.
- The Strategic Plan Contains: 3 Major Goals, 17 Objectives, 51 Strategies.



SPG continues to assist the City in the implementation of this plan, assist in documenting Fiscal Impacts to the City as a result of growth as well as assisting with the marketing of the program

| STRATEGIC PLANNING PROCESS | | | | |
|--|---|-----------------------------------|-----------------------------------|---------------------------|
| Phase 1 | Phase 2 | Phase 3 | Phase 4 | Phase 5 |
| Project Set-up | Community Assessment | Community Development Action Plan | Economic Development Action Plan | Economic Summit |
| Introduce Team | Identify Key Stakeholders and develop strategy for Public Input | Workforce Development & Education | Opportunity Analysis | Implementation Strategies |
| Define Project Expectations and timeline | Organizational Analysis | Land Use Plan | Site Location Analysis | Roll-out Event |
| Review previous reports and land use plans | Socioeconomic Analysis | Quality of Life | Internal Marketing & Coordination | |
| | SWOT Analysis | Tourism | "Best Practices" Examples | |



Current & Past Performance

TITUSVILLE, FLORIDA ECONOMIC DEVELOPMENT FEASIBILITY STUDY

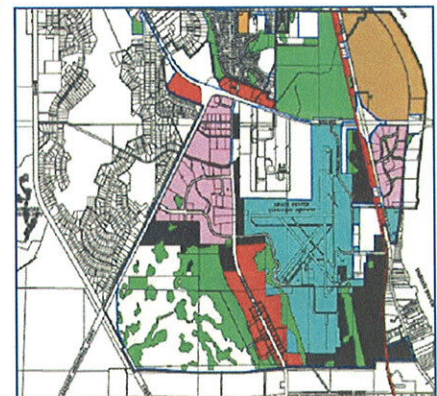
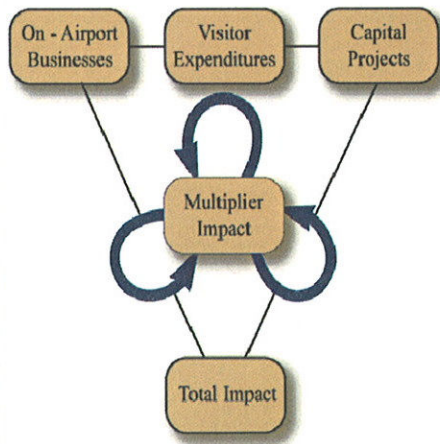
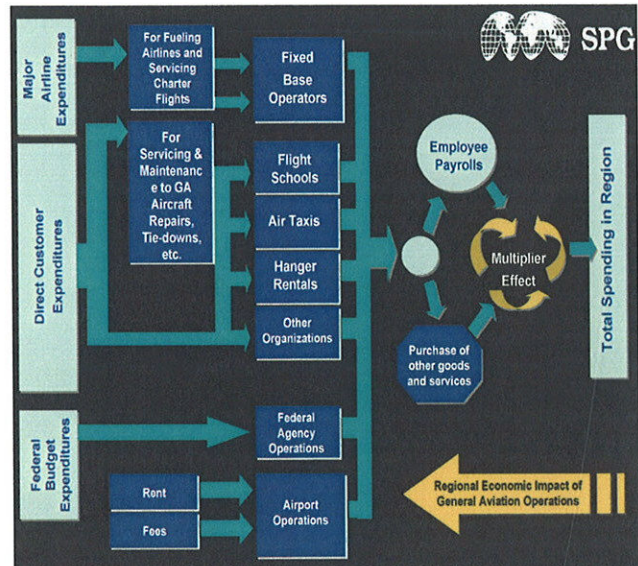
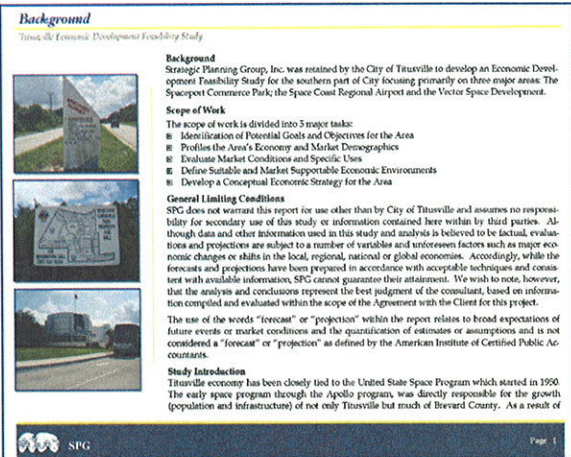


Client: City of Titusville, FL
Contact: Matt Chesnut

Time-Frame: 2007; Ongoing
Project Manager: Robert Gray, AICP

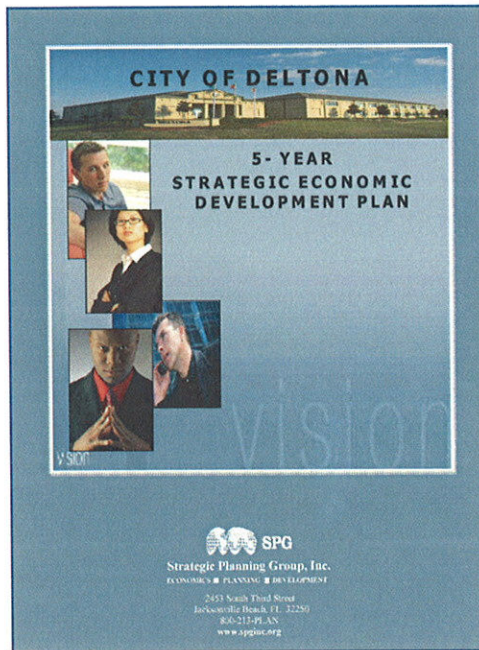
Description of Services: The scope of work was divided into 5 major tasks:

- ♦ Identification of Potential Goals and Objectives for the Area
- ♦ Profiles the Area's Economy and Market Demographics
- ♦ Evaluate Market Conditions and Specific Uses
- ♦ Define Suitable and Market Supportable Economic Environments





DELTONA ECONOMIC DEVELOPMENT PLAN

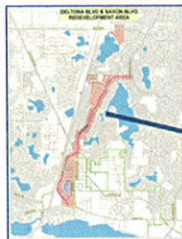


Client: City of Deltona
 Contact: Sally A. Sherman
 (386) 878-8853
 Time-Frame: 2007; Ongoing
 Project Manager: Robert Gray, AICP

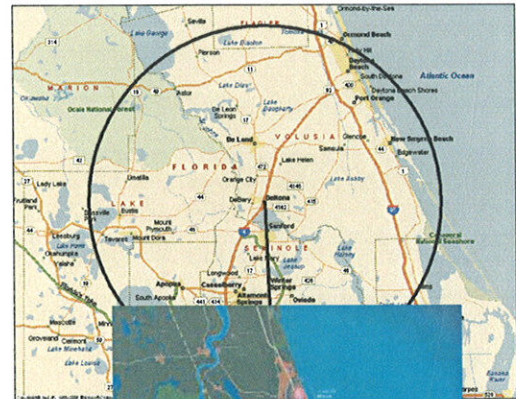
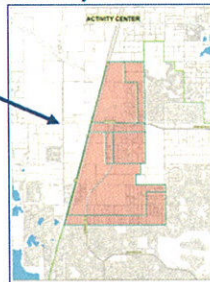
Description of Services: The work on this five year Strategic Economic Development Plan was undertaken in conjunction with the City's Economic Development Board and city staff, who were ultimately be responsible for managing and implementing the plan.

As a part of the work program, SPG developed a socio-economic profile of the City of Deltona, Volusia County, and selected other cities and counties in the regional area for comparative purposes. This work effort was designed to establish an overview of the City. In addition, workshops with the Economic Development Board were held on August 18 and September 10, 2007, to obtain input on community issues, goals, objectives, and strategies for the plan. This effort resulted in a general consensus, refinement, and prioritization of 28 objectives, and 44 strategies.

Deltona Blvd. & Saxon Redevelopment Area



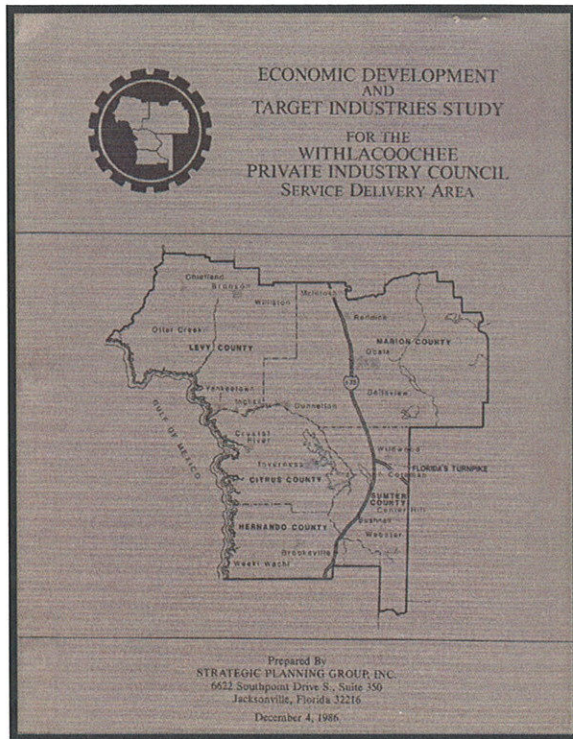
State Road 472 Activity Center



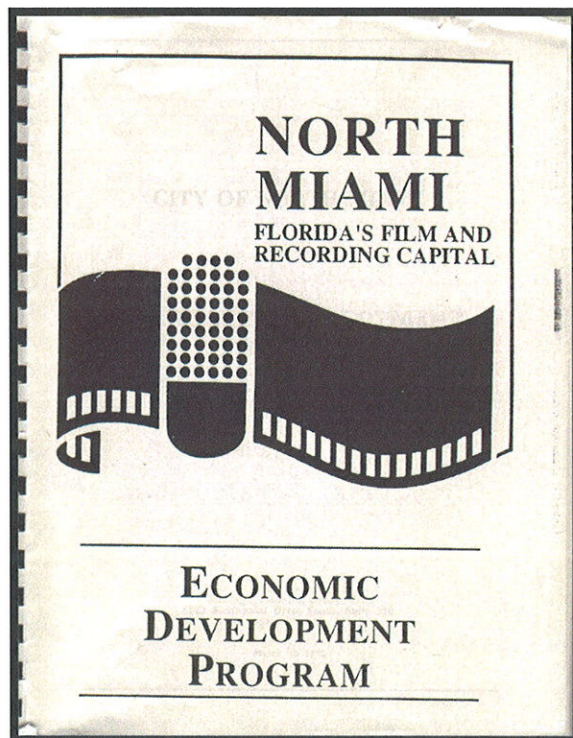
| Objective | Action Steps | Funding* | Year 1 | Year 2 |
|--|---|--------------------|--------|--------|
| Objective 1.1: Work diligently to enhance the City's reputation regarding its support of economic development. | | | | |
| Strategy: | Develop an economic development "theme" or "brand" for the City | Staff | | |
| Objective 1.2: Develop an overall economic development plan that will improve quality of life and increase opportunities of its residents. | | | | |
| Strategy: | Development Economic Development Strategic Plan with the help of an outside consulting group. | \$25,000 | | |
| Objective 1.3: Attract new Businesses | | | | |
| Strategy: | 1. Define appropriate "target industries" for the City | DEBAB/Staff | | |
| | 2. Join Metro Orlando to assist in marketing efforts | STBD | | |
| | 3. Develop marketing program aimed at area real estate brokers | DEBAB/Staff | | |
| | 4. Develop market program aimed at area/regional developers | DEBAB/Staff | | |
| Objective 1.4: Explore economic incentives to assist in the recruitment of business and industry. | | | | |
| Strategy: | Review economic incentives currently being used by surrounding communities/counties | DEBAB/Staff | | |
| Objective 1.5: Develop and enlighten industrial parks for business recruitment. | | | | |
| Strategy: | 1. Inventory existing vacant land parcels over 25 acres that are currently served by adequate utilities and have proper zoning for non residential development | GIS Staff | | |
| | 2. Identify commercial/industrial developers who could be potential prospects | DEBAB/Staff | | |
| | 3. Focus development in the 472 and 415 activity centers (see those activity centers for specific strategies) | DEBAB/Staff | | |
| Objective 1.6: Develop a retention program for the City | | | | |
| Strategy: | Develop a retention program | DEBAB / Consultant | | |
| Objective 1.7: Develop the framework and partnership to establish at least three economic centers. | | | | |
| Strategy: | 1. Develop inventory of currently developable parcels (with adequate infrastructure and zoning) by the three delineated activity centers (472, Deltona/Saxon, and 415/Howland). | GIS | | |
| | 2. Develop list of prospective companies and/or developers by activity zone. | Staff | | |
| | 3. Update future land use and zoning on high ranked sites if needed. | Staff | | |



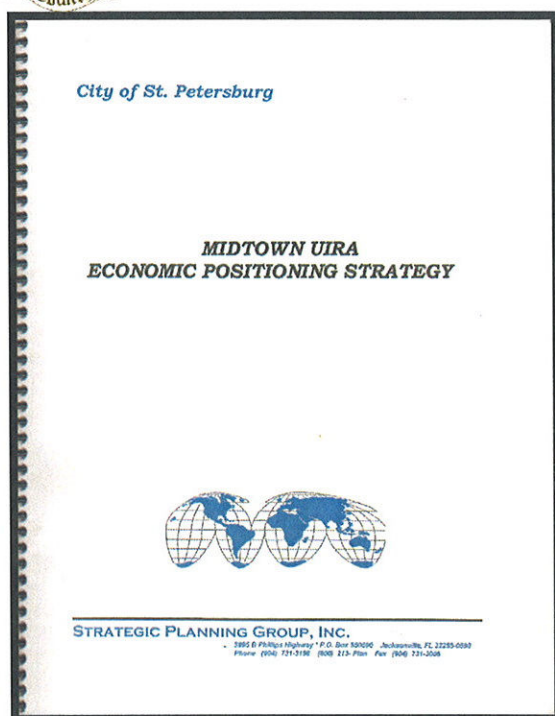
Current & Past Performance



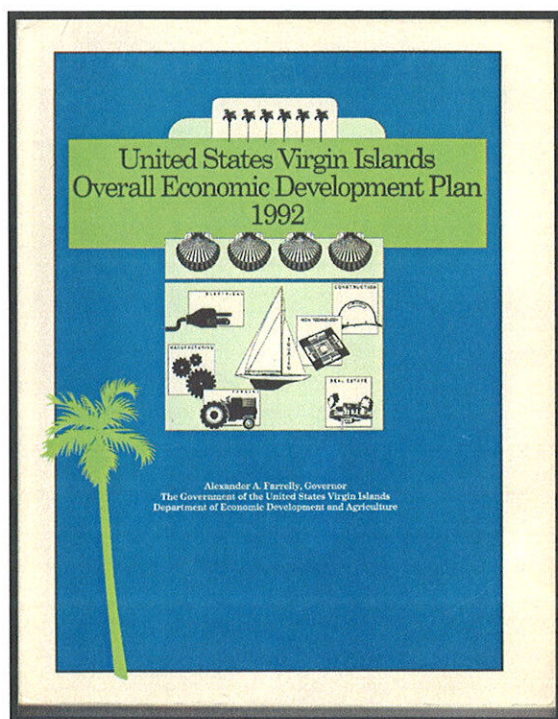
Withlacoochee Regional Industrial Targeting Study, Florida. SPG, utilizing its proprietary industrial targeting model, analyzed each of the region's five counties' (Marion, Sumter, Hernando, Citrus and Levy) potential for industrial development. The study was used by the Private Industry Council to work with each of the counties to develop job training programs to assist in the attraction of new businesses to both the region and individual counties.



Economic Development Program for the City of North Miami, Florida. SPG was retained by the City to develop its Economic Development Program, an outgrowth of the City's 2000 Vision Program. The City developed a program to increase its share of the State's Film and Recording Capital and began the process of land assemblage to create future commerce parks.



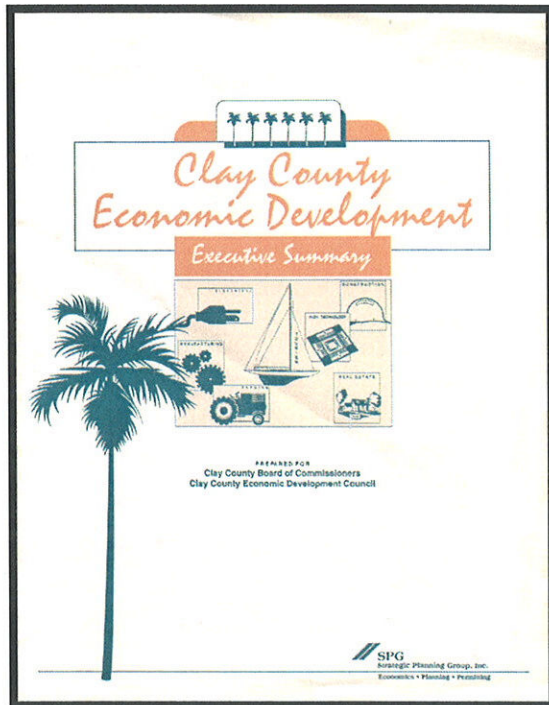
St. Petersburg's UIRA Economic Positioning Program. SPG, in association with RMPK Group, was retained by the City of St. Petersburg to re-evaluate its Downtown area, the City's historic African-American neighborhood/community. This five-square-mile area was evaluated, and SPG prepared a revitalization program aimed at reversing the area's residential base and capturing increased commercial/retail businesses. SPG provided extensive market and demographic statistics, including market potential for 1-, 3-, and 5- mile radii, as well as estimates of buying potential within the study area and its supporting region. Recommendations included developing a strong ministerial alliance, the creation of one or more CDCs, and mechanisms aimed at increasing the economic development potential of the residents and the area.



Economic Development Strategy, United States Virgin Islands. After international competition, SPG was selected to devise a strategic Economic Development Program for each of the Islands of St. Thomas, St. Croix, and St. John (separate plans). The overall goal of this effort was to develop a realistic plan to diversify and expand local job creation and develop implementation procedures to carry out the program. This program was developed to work in tandem with the Islands' Long-Range Growth Management Plans, the first attempt to combine Comprehensive Land Planning and Economic Development in the Caribbean.

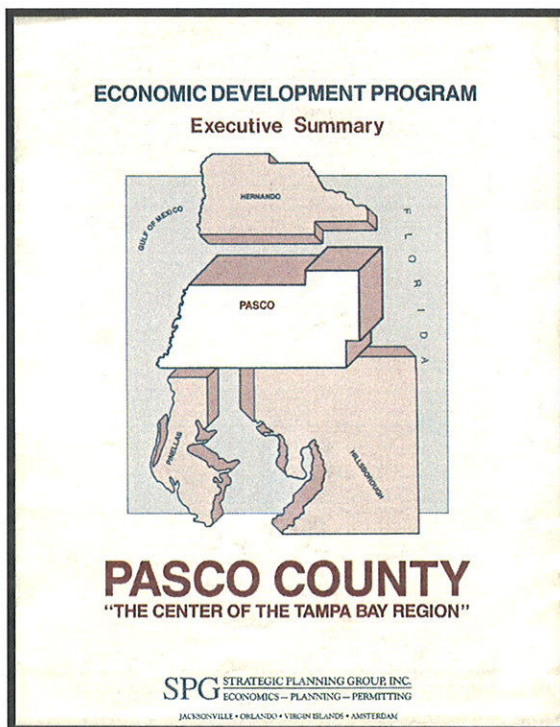


Current & Past Performance



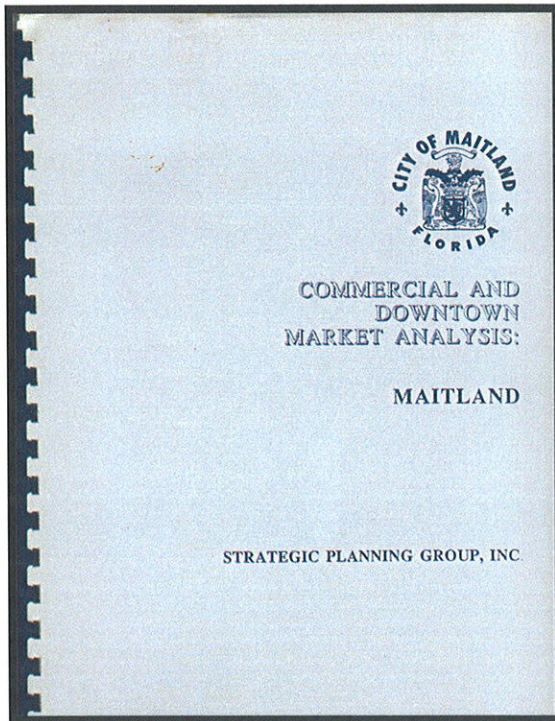
Economic Development Program for Clay County, Florida.

SPG was retained by the County Commission and the County's Economic Development Council to prepare a Countywide Economic Development Program to guide the County's Comprehensive Plan. The Plan contained a Business Plan and Target Industry Program to assist the County in attracting industry and business, thereby reducing the daily out-migration of workers to Duval County (Jacksonville). Clay County has recently landed over 7,500 new, high paying jobs as a result of the implementation of the County's strategy.

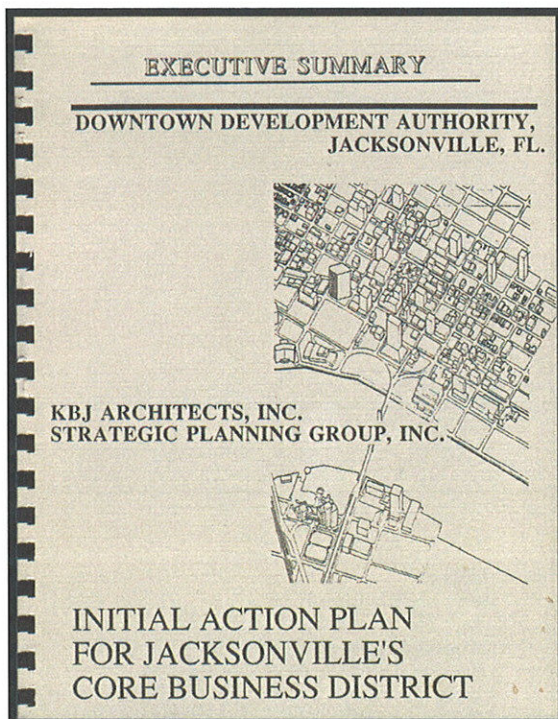


Economic Development Program for Pasco County, Florida.

SPG was commissioned by the Economic Development Council of Pasco County to develop an overall Economic Development Strategy for the County. SPG used its proprietary industrial target model to identify potentially targeted industries, to develop the overall strength and weaknesses of the County, and to recommend procedures for correcting deficient areas. An organizational analysis was also conducted and recommendations were given to strengthen the overall economic development procedures of the County. As part of the effort, detailed survey research and interviews were conducted to determine local perceptions and strengths and weaknesses. In addition, surveys and interviews were taken of industries that had looked at Pasco County but had chosen to locate elsewhere.



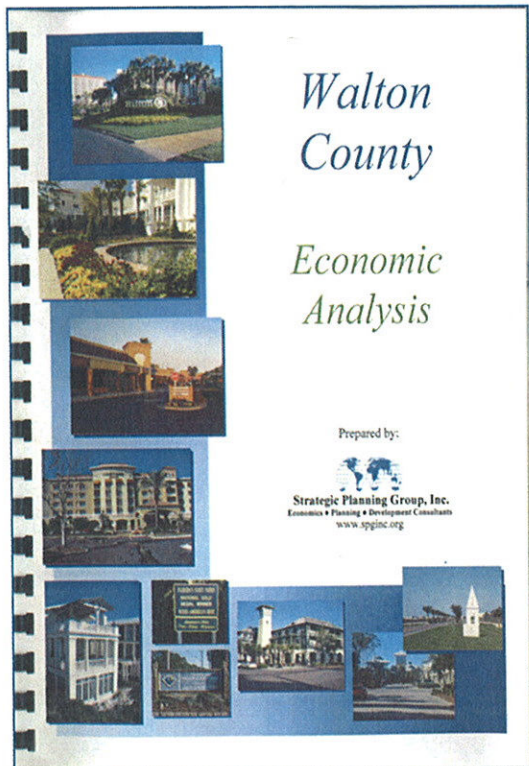
Downtown Revitalization Program, Jacksonville, Florida. SPG prepared the City of Jacksonville's first major redevelopment program. The process included an extensive public participation program that was recognized by the American Planning Association as a pioneering step in gaining public consensus in major redevelopment efforts. This effort followed earlier efforts by staff which included preparing the three CRA/TIF districts in Downtown. The City, as a result of these studies, was able to reestablish the government center toward the center of the CBD and off the riverfront, thereby allowing the riverfront properties to be developed into hotel, residential and retail/office space.



Downtown Commercial Market Study, City of Maitland, Florida SPG was retained by the City to develop the City's first commercial data base, to prepare a program to re-establish the Downtown as a regional service center, and to increase the City's ad valorem contribution. SPG staff worked with local business leaders to anchor small retail establishment to the area.

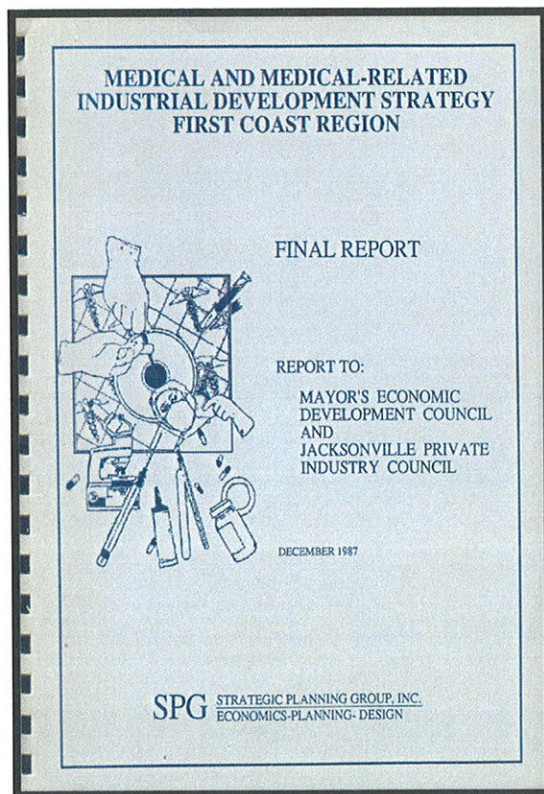


Current & Past Performance



Walton County Economic Analysis -

Strategic Planning Group, Inc. was retained by Walton County Tourist Development Council to conduct a Tourism Economic Impact Study of the County. Tourism is the single largest economic sector within the county – accounting for approximately 60% of the county's revenue (including the General Fund and School Board Funds). SPG was able to document the flow of tourism dollars throughout the economy and the importance of using tourism generated revenues to support related facilities and services.



BioMedical Economic Development Strategy for the First Coast, Florida.

SPG prepared the State of Florida's first Bio-Medical Economic Development Targeting Study for Jacksonville's Economic Development Council and the Private Industry Council. As a result of the study, Jacksonville worked closely with the University of Florida and Mayo Clinic to strengthen the basic research being conducted, and the region has developed into one of the State's three biomedical regional "clusters".



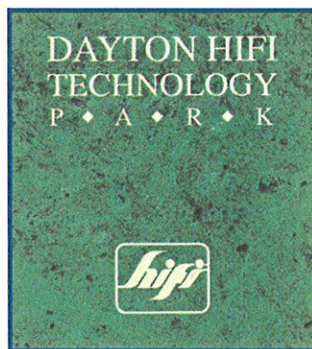
HIFI COMMERCE PARK: Hunter Industrial Facilities, Inc., Dayton-Houston, Texas

SPG personnel participated as Development Consultant for a 6,000-acre plus, mixed-use, commercial/industrial project featuring on-site disposal and storage of hazardous waste materials in salt dome formation located in Dayton, Texas.

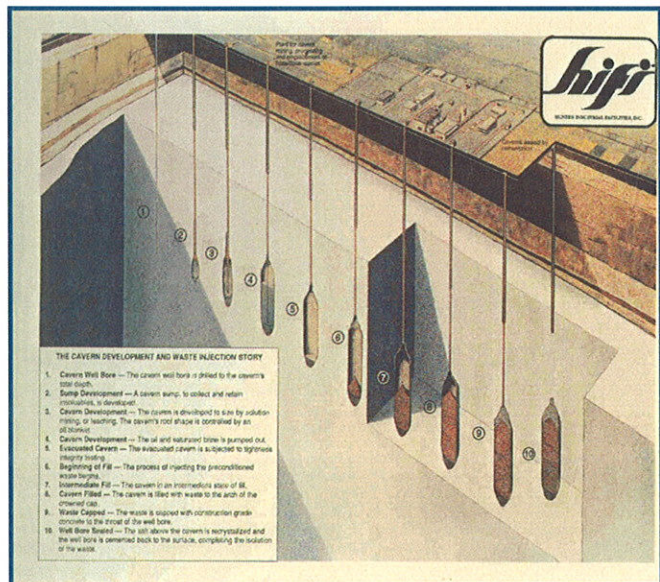
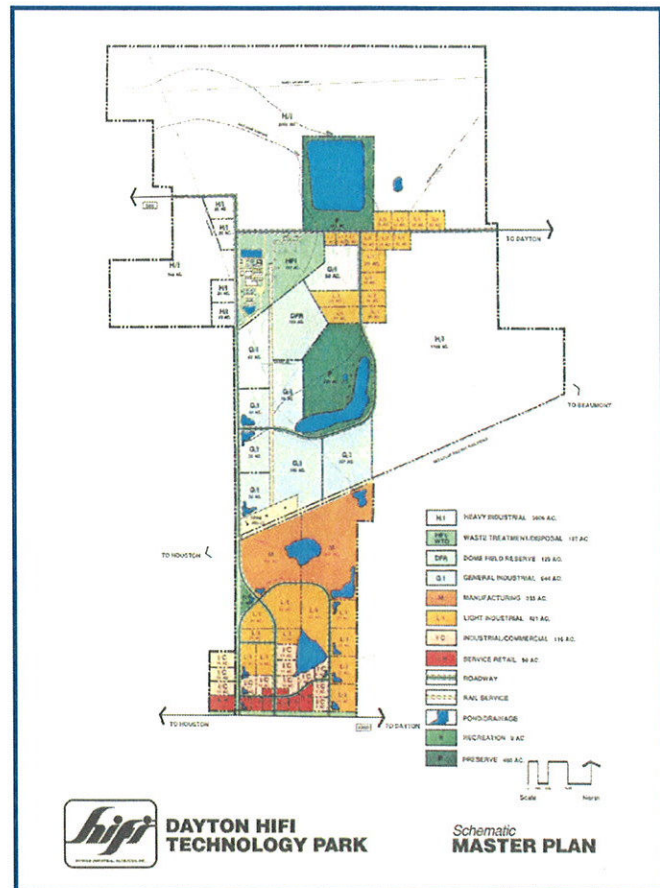
The planning and permitting process spanned a three-year period during which a complete land use development plan, financial plan, marketing program, and regulatory community input process was established and implemented.

Numerous studies were undertaken to establish the community benefits and liabilities associated with the project, including fiscal and employment impact analysis, environmental impacts, social needs assessments, and public safety concerns. Land use planning/re-use industrial identification was provided to determine industries that would be impacted by hazardous waste disposal issues and their particular land use needs.

The consultants represented the client and project at major national real estate and environmental trade shows.



Current & Past Performance





Current & Past Performance

ORLANDO CENTRAL PARK ORLANDO, FLORIDA

Orlando Central Park, a development of Martin Marietta Corporation, is a 5,000+ - acre development consisting of an executive office park, light manufacturing park, a distribution center and a commercial complex.

SPG professionals were involved in the creation of the complex from conceptualization and feasibility through planning and design of the overall facility over a 15-year period.

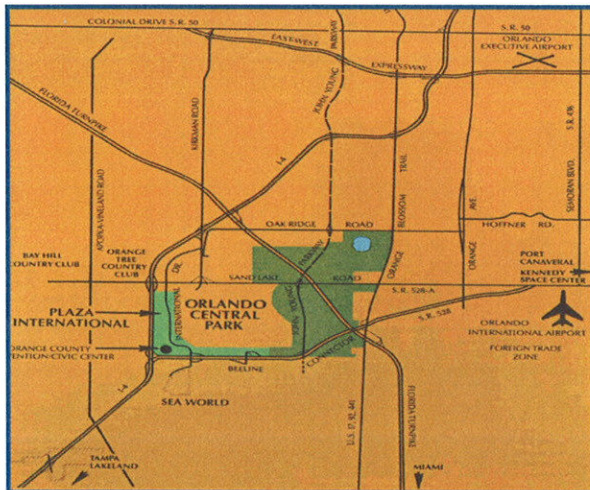
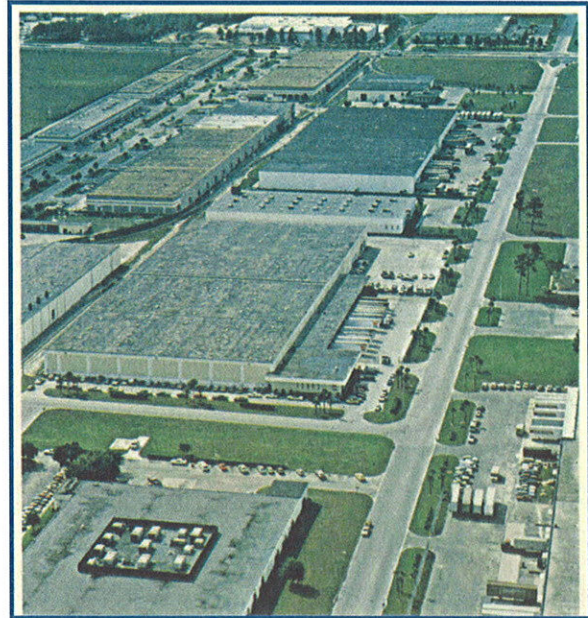
The park is home to over 350 companies whose buildings range in size from several hundred feet to over several hundred thousand feet. Containing over 25 miles of streets and highways and more than 250 separate buildings, the park has become a model for planned, industrial/commercial projects throughout the country.

SPECIAL BENEFITS

COMMERCIAL COMPLEX

LIGHT MANUFACTURING PARK

DISTRIBUTION CENTER





STATEMENT

SPG has demonstrated over its 26 year history, the ability to handle a large number of projects concurrently. For example, SPG recently completed a five-year open end contract with the U.S. Department of Air Force, where this year we conducted five simultaneous studies for the Air Force per year. We also completed the State of Florida's military affordable housing needs study for each of the State's 17 military bases within a four month period.

Our current projects include:

We have demonstrated our ability to meet multiple and simultaneous contract deadlines for all levels of government, including Jacksonville as show within this submittal.

All key personnel defined in this RFP have sufficient time availability to meet the ability to meet the needs of this contract.

| Project | Total Value | Percent Complete | Completion Date | Personnel |
|---|-------------|------------------|-----------------|--------------|
| Open End 3 year Consulting Agreement—Pasco County | na | 5% | 2011 | Robert Gray |
| Broad River S.C. Redevelopment Plan | \$50,000 | 5% | Feb. 2010 | Tony Mondae |
| Miami International Airport Bonding | \$200,000 | 90% | Feb 2010 | Mike Plummer |
| JFK Airport Bonding | \$360,000 | 90% | Feb 2010 | Mike Plummer |
| Jackson County Comprehensive Plan | \$100,000 | 90% | December 2009 | Robert Gray |



TAB 2

Approach



APPROACH

To be successful, any economic development program and its implementing marketing strategy must have the necessary data on which to base its strategic marketing initiative. The starting point is knowing and quantifying the assets that it is “selling”. For example, if there are no detailed data on existing building inventory or usable vacant land inventory, there is little the County can do to “sell itself”. We believe that promoting a County’s economic development potential is a complex process. The following chart demonstrates the process SPG utilizes during the economic development strategic planning process. The process is based on “informed public vision’s process” to establish the larger issues or macro view of the community. By “informed”, SPG believes that prior to the visioning process participants (stakeholders) need to have a common understanding of where the community is today, where it has come from, and what national trends may impact them. That is why we prepare a socio-economic assessment or community profile prior the running the Vision’s Charrette process.

| Phase 1 | Phase 2 | Phase 3 | Phase 4 | Phase 5 |
|--|---|-----------------------------------|-----------------------------------|---------------------------|
| Project Set-up | Visioning Session and Summit | Community Development Action Plan | Economic Development Action Plan | Economic Summit |
| Introduce Team | Identify Key Stakeholders and develop strategy for Public Input | Workforce Development & Education | Opportunity Analysis | Policy Strategies |
| Define Project Expectations and timeline | Socioeconomic Analysis | Land Use Plan | Target Industry identification | Code Improvements |
| Review previous reports and land use plans | Visioning Session and Summit | Quality of Life | Economic Modeling | Implementation Strategies |
| | SWOT Analysis | Retention Strategies | Internal Marketing & Coordination | Marketing Strategies |
| | | | | Roll-out Event |
| | | | | |

A major purpose of the Vision sessions is to determine the local stakeholder perceptions on the area’s Strengths, Weaknesses, Opportunities and Threats (SWOT) as it relates to the economic development potential of the County, which forms the basis of the Strategic Plan and establish the “vision” of the economy over the next 5-10 year period.

SPG has learned that in most communities in the State, income producing properties are being replaced by residential uses; the problem being the while residential property is fairly footloose (can locate anywhere), commercial and industrial properties have unique siting requirements. If those potential sites are removed from inventory than replacement properties may not be viable either because they do not exist or the cost is prohibitive for those uses.



The following is a discussion of the scope of work we propose for this effort.

Understanding and Approach

Sumter County has demonstrated significant population growth over the last decade. Its employment base, historically linked to retirees and “snow-birds,” (The Villages) has evolved and the County is positioned to increase its role as an economic catalyst for the region. Lying immediately to its south, Lake County is one of the State’s fastest growing counties, in large part due to its part of the Orlando MSA.

Within Sumter County, the housing boom absorbed significant, large, prime, industrial/commercial sites which have not been replaced. In addition, communities within the County have competing priorities, such as finding inexpensive land for public facilities or meeting environmental and recreation needs. As large tracts become scarce, pressure to change land use and zoning districts increases making it difficult for private property owners to bear the cost of holding land (especially industrial) for long periods of time.

Not all commercial or industrial space demand is job-driven. For example, distribution use (warehousing, etc.) is primarily driven by inventory requirements, not jobs, and is regionally driven. Just-in-time inventory flow is a major component of most large distribution and manufacturing firms, which has a significant impact on future site selection efforts.

The suggest approach is described below:

Project Set Up

The Project Set Up phase will set the tone for the entire strategic planning process by defining the expectations of the County and SPG. In addition, the key issues that affect the County’s economic development potential will be raised.

1. Initial discussions with the County and staff to define expectations and mission:

Throughout the project, SPG will look to the County and other selected leaders to serve as Advisory Council overseeing the project. The Advisory Council will be expected to review all deliverables and provide insight and understanding of report findings.

2. Initial data collection and review of previous reports:

We will obtain and review previous reports, assessments, and plans undertaken or commissioned by the County, or other entities as related to economic development, land use planning, and zoning.

The insights gleaned from these reports and findings will educate the project team and allow for a review of prior successes and failures in the planning arena. We will also request information and data sets needed for the project that can be obtained through the County.

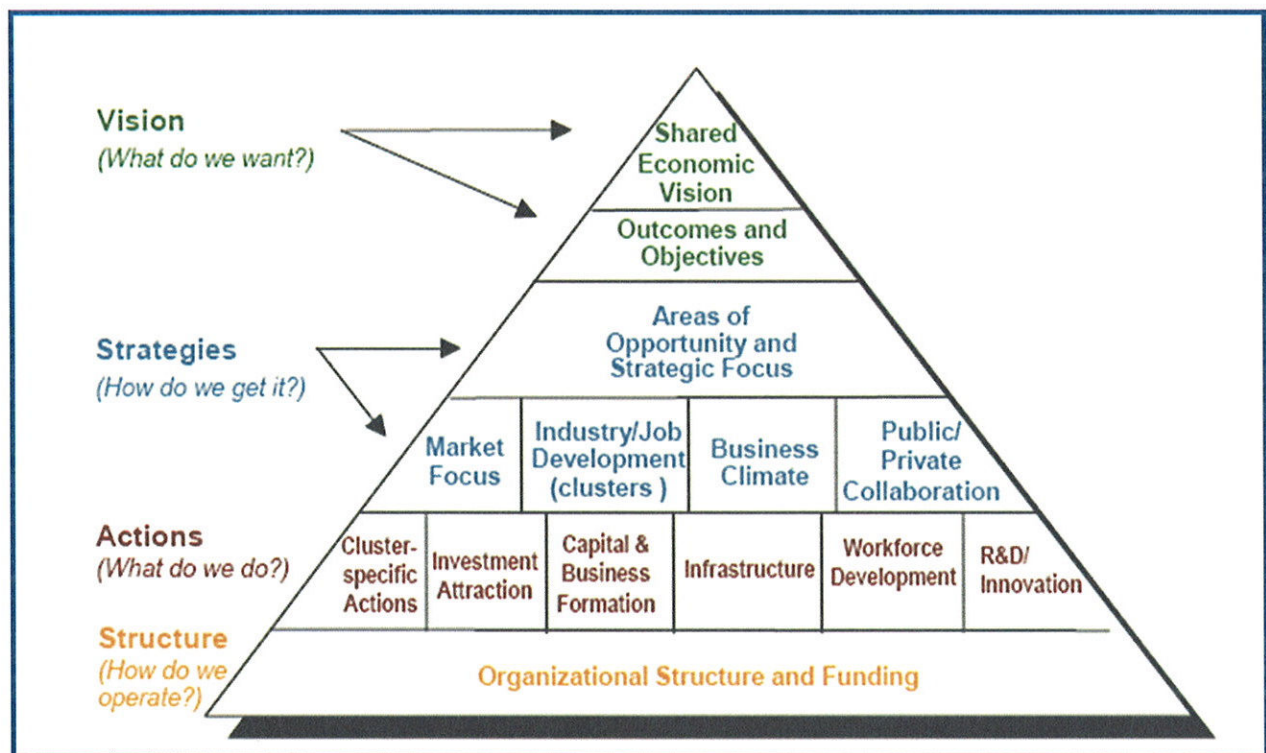
PHASE I – VISIONING SESSIONS



Prepare a visioning format to attract maximum participation from the business community and development industry to develop recommendations on the types and locations of high wage industries desirable for Sumter County. *This is one area that has separated us from other consulting groups. We have developed successful Visions programs for communities around the world as shown within this submittal. Recently we conducted a major visions/Charrette program for Ormond Beach, Titusville as well as larger program for Volusia County (conducting them throughout the County). Our public participation program has won numerous awards.*

It is anticipated that more than one series of sessions will be required, if it is felt that attendance at only one location will hinder stakeholder involvement.. A final visioning summit will be held in a central location to summarize and finalize the results of the visioning sessions.

A document summarizing the process will be prepared and submitted to Sumter County Department of Economic Growth and Redevelopment.



A presentation on the visioning sessions will be made to the Sumter County Board of Commissioners. This process provides the guidance (goals) needed to drive the Strategic Plan.



Phase II– Strategic Plan Development

Target Industry Study

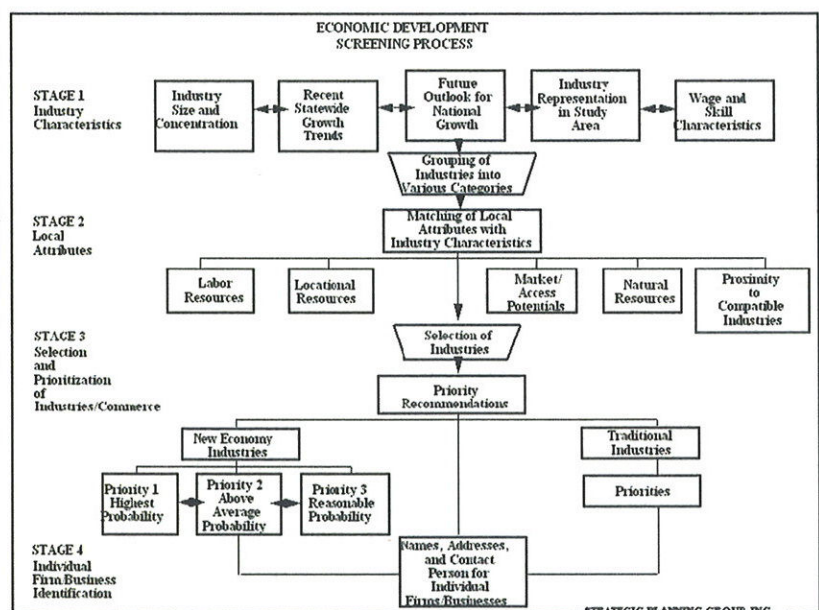
Analyze the County's geo-economic assets and limitations that may affect site selection for primary employers.

SPG is a corporate site relocater and has assisted private industry and communities define the geographic requirements needed by major employers.

The starting point of understanding site requirements is first to define specific targets or the major users. For example, one description of prime industrial land might be:

- ♦ Net, contiguous, developable acreage in large, flat, and symmetrical configurations;
- ♦ Minimal or no development constraints
- ♦ Access to an available workforce for a specific industry type;
- ♦ Sufficient capacity in local transportation system;
- ♦ Proximity to interstate highways, rail, airport/marine ports;
- ♦ Easy access to water, sewer, gas, electricity and telecommunications;
- ♦ Free from encroachments of incompatible uses or other unique requirements (high volume of water, etc.);
- ♦ Proximity to suppliers, customers, markets and related uses (backward and forward linkages);
- ♦ Location within functioning industrial or commercial parks; and
- ♦ Land viable for targeted industry.

While not part of Metro Orlando, as is its southern neighbor Lake County, Metro's target industries will be reviewed for their relevance to Sumter County's Economic Development Efforts. In addition, SPG will analyze the County's economic development potential based on its own cluster and economic development models. The following chart is a simplified version of an industrial screening methodology used by SPG.





PHASE III– Implementation Strategies

In Phase Three we will identify strategies aimed at improving conditions for business within the County.

1. **Workforce Development & Education**

In the Workforce Development section of the Community Development Action Plan, we will provide recommendations related to building and supporting workforce development and education programs that will build a workforce capable of meeting future industry demands.

We will compare the workforce requirements of high impact industries against the institutions and programs available in the County. We will assess the area's access to college-based research programs and provide recommendations related to supporting those programs capable of meeting future development demands.

The objective of this section of the Strategy will be to determine what actions the City, County, economic development agencies, municipalities, educational institutions, and other stakeholders should take to ensure a high quality workforce that can support future development in the County.

Workforce issues are an area of expertise for SPG. The firm has been involved in improving workforce development systems for several years. As a result, we have developed a deep understanding of workforce issues and development programs throughout the nation.

2. **Land Use**

In this section of the report, we will conduct an evaluation of sites for industrial, commercial, and retail development in the County. We will also set objectives for future development and land use planning in the County.

3. **Implementation Tools and Strategies**

Some of these efforts include:

A. SPG will create a data base of major current primary employers within the County and identify their future expansion or relocation needs and/or potential. *SPG will create a data base of major employers within the County. Future expansion needs will be determined by both interview and survey data.*

B. SPG will also create a data base of all major vacant land that has commercial/industrial potential by two types of development potential: with and without supporting infrastructure (water, sewer, zoning, etc.)

C. SPG will create an incentive matrix for development and redevelopment to be included in the strategic plan. *SPG will create an incentive matrix that could be used to assist various types of industries expand and/or relocate into the County.*



D. SPG will develop redevelopment strategies

SPG will identify areas of Sumter County with underutilized or poorly planned industrial development that could benefit from redevelopment efforts. County staff will recommend areas of the County for evaluation. *SPG is the leader in the State of Florida in assisting local communities in their redevelopment efforts. We have created over 17 redevelopment plans within the State of Florida over the last seven years which have included major industrial properties.*

F. SPG will prepare recommendations on how to achieve the economic development goals for those identified areas. *This is a critical area in that it moves the planning process into an actual economic development program.*

G. Real Estate Economic Models

SPG can prepare economic feasibility and development models for major land use types for primary and secondary employment uses. Office, warehousing, distribution, and light manufacturing uses are desired elements. Identify factors affecting the economic feasibility of encouraging development and redevelopment to occur within those land use types. Review the County's Future Land Use Map for proposed amendments needed to accomplish economic development goals. *SPG is familiar with all existing models including FLAM, REMI, RIMSII and other models that can be used to document economic and fiscal impact to the local jurisdictions.*

H. Code Improvement Objectives

SPG will identify obstacles in the County's current land development regulations that would work in opposition to the economic development objectives identified during the visioning process. *Again, this is one area that separates SPG from other consulting groups as we have prepared over 17 Growth Management Plans (9J-5) in Florida. Our Comprehensive Plans are economically driven.*

I. LDR amendments

SPG will prepare a list of recommended amendments to the Code to address the issues identified in the previous tasks.

J. Public Policy Strategies for Economic Development

SPG will recommend strategies to encourage public and private partnerships for those looking to invest in the economic development of Sumter County. *The timing of this effort is excellent given the projected build-out of Seminole County, and the possible move by CSX rail to divert its tonnage through Orlando by allocating more traffic through Sumter County.*



K. SPG will prepare recommendations on how the County can improved its geo-economic “attractiveness”. *Based upon the SWOT analysis and SPG experience in benchmarking industry requirements SPG will provide recommendations as to ways the County can minimize any negative attributes while strengthening its positives.*

L. SPG will identify, by industry, primary industries most likely to locate or expand in the County and that will pay a wage rate substantially higher than the current average wage rate for Sumter County. *SPG will identify industry types by three to five NAICS codes with applicable wage levels as defined by the Florida Department of Labor.*

NAICS companies have different location and price requirements that are changing with technology and environmental/permitting requirements. Access to transportation infrastructure remains one of the most fundamental siting factors for all types of industrial facilities. It is more critical for distribution-oriented industries and less critical for R&D flex and multi-tenant buildings. National studies demonstrate that land price, location near retail spending, and location near blue collar workers are the most important site requirements for most industrial properties (as defined above) once zoning is removed from the equation. It is important to note that past or existing zoning could have had an impact on the current distribution of jobs, and thus, may not represent the future best fit.

This task will define the locational requirements for each of the specified NAICS targeted industries. Consideration will be given to urban infill and redevelopment opportunities, including mixed-use development. Once general locations have been quantified, acreage requirements will be superimposed to determine and rank suitable areas.

M. Marketing Program

SPG will develop a marketing program for the County’s Economic Development process. It will focus both on industry retention and attraction. Once the data bases have been developed and the SWOT analysis complete, SPG working with stakeholders will develop alternative marketing concepts and delivery systems for implementation. It will outline the various programs, costs and responsibilities in a matrix format.



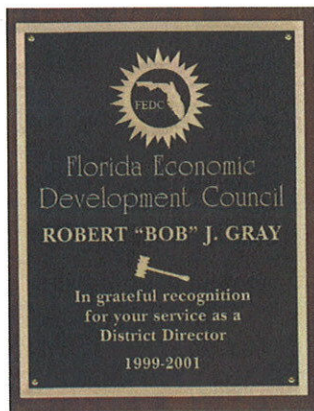
TAB 3

Key Personnel



Key Personnel

Robert John Gray, AICP Project Manager



As Chairman of Strategic Planning Group, Inc. (SPG) Mr. Robert Gray is a national leader in Economic Development and Redevelopment Planning and Implementation. He is active and has served as a Director of the Florida Economic Development Council (REDC). He has also been on the Economic Development Boards of

three (3) city Economic Development Boards.

Mr. Gray has completed over 40 economic development plans and economic repositioning studies worldwide, including the recently completed Deltona ED Strategic Plan. Other plans include Volusia County and the City of Ormond Beach Economic Development Strategic Plans, as well as programs for Clay, St. Johns, Pasco, Duval, Sumter, Hernando, Citrus and Marion Counties and over fifteen municipalities, in Florida alone.

He is a leader in preparing Redevelopment Programs having prepared over 30 for local governments, 20 within the State of Florida. He is a member of the Florida Redevelopment Association. Mr. Gray is a Florida Real Estate Broker

Summary of Project Experience

Economic Development/Site Location

- ♦ Created effective economic development strategies for over 40 local, regional, and national governments, including Australia, Egypt, the Caribbean, and locations throughout the United States; including Volusia County, Polk County, Pasco County, Clay County, Ormond Beach and most recently Deltona and Titusville.
- ♦ Prepared relocation/redevelopment studies resulting in the creation of over 60,000 jobs.
- ♦ Prepared workforce development programs and cost/wage surveys for local governments
- ♦ Prepared Visions Program and has been acclaimed for public participation programs in developing and implementing economic development strategies.

Redevelopment Planning

Created effective CRA redevelopment plans/strategies for over 35 local, regional, and national governments including Australia, Egypt, the Caribbean, and locations throughout the United States that include:

- ♦ 12 Downtown CRAs
- ♦ 12 African American CRAs
- ♦ 10 Corridor CRAs
- ♦ 6 Tourism Related CRAs

Development Economics/Feasibility

- ♦ Prepared feasibility studies for over 450 million square feet of commercial/industrial space, 25,000 residential units, and \$10 billion worth of resorts internationally.
- ♦ Clients include: Forest City REIT, iStar Financial Services, Lennar Corporation, K. Hovnanian, Prudential, Robinson-Humphrey (American Express), Campeau International (Allied and Federated Stores), DeBartolo, General Development Corporation, David Weekley Corporation, U.S. Government and Arvida.

SPECIFIC EXPERIENCE

Economic Development/Site Location Studies

Directed the Economic Development Programs for Titusville, Deltona, and Ormond Beach, FL. Directed Volusia County's Economic Development Strategic Plan; Economic Repositioning studies for: Bradenton FL; Safety Harbor FL; Rockledge, FL; Cocoa, FL; St. Petersburg, FL; Melbourne, FL; Deland, FL; Vero Beach, FL; North Miami Florida; Boynton Beach, FL; Delray Beach, FL; Ormond Beach, FL and Palm Coast FL. Project Director for the Overall Economic Development Program (OEDP) for the U.S. Virgin Islands. Directed the economic development program for the Northern Territory of Australia. Project Officer for Egyptian Free-Trade Zone Feasibility Study (five trade zones). Prepared the Strategic Tourism Repositioning Study for Panama City Beach. Directed the Labor Market Study for JEA/Jacksonville Coca. Project Director for a five-county regional economic development/target industry study for: Citrus County, FL ; Sumter County, FL ; Hernando County, FL; Levy County, FL ; and Marion



Robert John Gray (continued)

County, FL. Project Director for St. Johns County, FL's Economic Development Profile. Served as Project Director for Clay County, FL's Economic Development Program, Wage Study and Profile. Served as Consultant to Citrus County, FL Committee of 100. Consultant to Lee County, FL's Economic Development Committee generating economic development alternatives and strategies for adoption of realistic Comprehensive Plan. Project Manager for the 10-county Coosa River Industrial Targeting Study for the United States Corps of Engineers (COE) including Etowah, Calhoun, St. Clare, Talladega, Shelby, Chilton, Coosa, Autauga, Elmore, and Montgomery Counties. Directed the First Coast Region of Florida's Medical and Bio-Medical location study for Jacksonville, FL Chamber of Commerce. Directed economic impact statement for the Port of Jacksonville, FL. Directed the commodity tonnage studies for Port Everglades, FL Master Plan and CEIP program. Directed Panama City, FL's Wage Study. Site Location: Directed market studies for Allied Stores on their Jordan Marsh and Maas Brothers Department Stores in Palm Beach County, FL; Orange County, FL; Seminole County, FL; Collier County, FL; Hillsborough County, FL; and potential new facilities in Duval County, FL; Port Charlotte, FL; and Vero Beach, FL. Project Manager on a Racetrack DRI in Central Florida; Project Director for several DRIs, including two studies on Amelia Island for future tourist developments and a study for expanding the Seaboard Coastline Railroad facilities in Jacksonville, FL. Directed preparation of environmental impact statement for the Coosa River navigational project, Mobile District COE.

Redevelopment Planning

Project Director for the SR100 Palm Coast Centre CRA; Ormond Beach North Mainland CRA; Central Bradenton CRA; Downtown Safety Harbor CRA; Boynton Beach Heart of Boynton Redevelopment Plan; Delray Beach West Atlantic Plan; Deland Springfield Annexation Plan; Rockledge Redevelopment Plan, and the Greater Leesburg CRA highest and best use study. Principal Economist on the South Rome Georgia Redevelopment Plan; the Hinesville, Georgia Redevelopment Plan, and the Downtown Washington NC redevelopment Program. Project Director for the City of Jacksonville's Initial Downtown Action Plan, and 3 CRAs/TIFs. Directed the redevelopment master plans for the Cocoa US1 corridor, the A1A Daytona Beach Shores Urban Design Plan, di-

rected the economic sections of Cocoa's Diamond Square CRA, Winter Haven's Downtown CRA and Winter Haven's Florence Villa CRA. Directed Vero Beach's CRA Master Plan, the downtown plan for North Miami, as well as the USAID funded redevelopment Plan for Kingston Jamaica.

Affordable Housing Programs

Mr. Gray has prepared over 10 housing elements, over 100 housing market studies and affordable and/or workforce housing programs nationally. Examples of his affordable/workforce experience includes:

- ♦ Directed Hall County, GA Affordable Housing Program, 2008
- ♦ Directed the Sunrise Affordable Housing Linkage Fee Study, 2009
- ♦ Authored Titusville Affordable Housing Study 2008
- ♦ Directed the Affordable and Workforce Housing Studies for Palm Beach County, 2007/8
- ♦ Ft. Lauderdale Workforce Housing Study, 2006
- ♦ Directed Coconut Creek Linkage Fee Study, 2006
- ♦ Directed Washington County, UT, Housing Study, 2007
- ♦ Authored Ormond Beach, FL Affordable Housing Program, 2005
- ♦ Authored St. Johns County Affordable Housing Program, 2002
- ♦ Authored Pasco County Affordable Housing Program, 2001
- ♦ Authored St. Johns County Elderly Housing
- ♦ Prepared 20 affordable housing feasibility studies for local Housing Finance Agencies in Florida, as well as ten feasibility studies for Florida's Housing Finance Corporation

EDUCATION:

Doctoral Courses, University of Florida

M.A., University of Florida, 1972

B.A., University of Florida, 1970

Corporate Management Courses, Harvard University



Anthony (Tony) Mondae

Economic Development

Mr. Mondae has extensive experience as project director and principal consultant on a wide variety of target industry studies, real estate development projects, land uses, Vision/strategic planning, and economic revitalization, including recreational facilities, industrial parks, tourism development, hotels, new communities, retail projects, corporate real estate development and local, state and federal government projects.

As a market development consultant for Federated Department Stores, Mr. Mondae provided market research and market strategy support for the company's east coast department, specialty and discount department stores. He is experienced in retail site selection, lease negotiations, demographic analysis and market development-strategic planning.

His industrial development experience ranges from location studies to new industry development and industrial impact analysis. Industrial development studies have been conducted for such clients as ITT's Palm Coast Community Division, Gulf Reston, City of Miami Beach, Gulfstream Development Corporation, Trafalgar (Division of GE Credit), and numerous private clients.

Mr. Mondae's strategic planning experience includes large-scale land planning projects, property disposition, highest and best use strategies, marketing program development, packaging, and corporate real estate plan development.

CAREER DETAILS:

2000 to Present. President, SPG, Inc.

1993-2000: President and CEO, LANDVEST Market Economics & Development Consultants

1977-1993: Reynolds, Smith & Hills, Architects, Engineers, Planners, Inc. Positions Held:

- ♦ 1990-1993: Reynolds, Smith & Hills, Architects, Engineers, Planners, Inc. Vice President-Director of Planning and Development Division
- ♦ 1987-1990: Hunter Services, Inc. (formerly Reynolds, Smith & Hills, Inc./ PLANTEC Corporation) Senior Vice President, Director of Development Economics
- ♦ 1977-1987: PLANTEC Corporation Management Consultants (wholly owned subsidiary of Reynolds, Smith & Hills, Inc.). Senior Vice President 1984-87 and Board of Directors, Vice President 1982-1984, Associate Vice President 1978-1982

1973-1977: Hammer, Siler, George Associates, Washington, D.C. Senior Associate, Market Development Consultant

1971-1973: Federated Department Stores, Cincinnati, Ohio. Market Analyst/New Market and Store Development



Michael K. Plummer

Economic Development

Michael Plummer has over 30 years experience as an economic and real estate advisor to public and private sector clients. Prior to joining SPG, Mr. Plummer served as the Southeast Regional Director of Real Estate and Financial Management Consulting for KPMG Peat Marwick. Mr. Plummer served on the Firm's Real Estate Steering Committee and participated as an instructor in KPMG's in-house training programs.

Mr. Plummer served as National Director of the firm's Corporate Real Estate Consulting Practice, where he developed corporate real estate/facility strategies for major corporations like Federal Express, Norfolk Southern, and Xerox Reality. Mr. Plummer was also a member of KPMG's Mergers & Acquisitions Practice as real estate finance specialist. In this role, he served as a senior consulting manager on several major real estate transactions, including Cadillac Fairview, Westin Hotels, Xerox Reality's portfolio, and the bankruptcies of US Homes and LJ Hooker.

Mr. Plummer has assisted numerous communities in Florida and throughout the Southeast region in the areas of economic development, downtown revitalization, and development planning. Some of his projects include:

- ♦ Panama City Redevelopment Authority – Mr. Plummer prepared a downtown redevelopment strategy for the revitalization of the downtown of Panama City, Florida, which included a strategy to redevelop the waterfront and pier area. He also assisted in the valuation of the master lease for the pier.
- ♦ City of Key West – Mr. Plummer assisted the City in evaluating the proposed development program for the redevelopment of the Truman Annex and assisted in negotiations with the developer.
- ♦ Tallahassee Downtown Redevelopment Authority – Mr. Plummer assisted the authority in

evaluating plans for a new convention center hotel development.

- ♦ City of Charleston – Mr. Plummer worked closely with the Mayor's office in the planning of a proposed Civic Center project.
- ♦ Georgia World Congress Center – Mr. Plummer prepared the economic impact analysis for one of the largest convention centers in the country.
- ♦ Escambia County – Mr. Plummer prepared the market study and economic impact analysis for the expansion of the Pensacola Civic Center.
- ♦ Birmingham/Jefferson Convention Center Authority – Mr. Plummer prepared the market study for the development of a convention center hotel and assisted the Authority in the selection and negotiations with a national hotel chain.
- ♦ Georgia International Horse Park – As part of an Economic Development/Land Use for the City of Conyers Georgia, Mr. Plummer assisted in the planning of a world-class equestrian facility that hosted

Educational/Personal Background

Bachelor of Business Administration (Economics), University of North Florida, 1976

Master of Science (Real Estate), Georgia State University, 1993

Florida Governor Bob Graham's Council of Economic Advisors, 1982-1984

Florida Governor's Task Force on Housing, 1979

Economic Advisor to the Atlanta Committee for the Olympic Games, 1989 to 1996



BUSINESS & FINANCIAL REFERENCES



BUSINESS & FINANCIAL REFERENCES

Client: City of Ormond Beach
Entity: Strategic Economic Development Plan
Fiscal Impact Study
CRA Redevelopment Plan
Contact: Mr. Joe Mannarino
Director - Economic Development
Address: **City of Ormond Beach**
22 South Beach Street
Ormond Beach, FL 32175
Telephone: (386) 676-3266 (Office)
(386) 676-3330 (Fax)
Email: mannarino@ormondbeach.org
Year Completed: October 2004 - present
Nature of Work: SPG has been assisting the city of Ormond Beach for over seven years with a host of redevelopment efforts, ranging from the city annexing, a seven thousand acre green field, creation of a CRA and subsequent redevelopment plan, a detailed fiscal impact study of redevelopment activities, five year strategic economic development program.
Total Cost: \$100,000+

Client: City of Bradenton (Florida)
Entity: Bradenton Central CRA and Implementation Program
Contact: Mr. Sherod Halliburton
Executive Director, Central Community Redevelopment Agency (CCRA)
Address: 302 Manatee Avenue East, Suite 301
Bradenton, FL 34208
Telephone: (941)-744-2362 (Office)
(941) 744-2380 (Fax)
Email: sherod@bradentonccra.com
Year Completed: June 2003 - May 2009
Nature of Work: SPG has been working with the Bradenton Central CRA for over five years assisting in the development of the district's redevelopment plan. (June 2003) SPG has recently completed an update of that plan for the CRA. (May 2009)
Total Cost: \$90,000+

Client: Downtown Melbourne CRA
Entity: Historic Melbourne Redevelopment Study
Contact: Ms. Cindy Dittmer
Planning and Economic Development Director
Address: 900 E. Strawbridge Ave.
Melbourne, FL 32901
Telephone: (321)-953-6209 (Office)
(321) 674-5743 (Fax)
Email: cdittmer@melbourneflorida.org
Year Completed: May 2005 - October 2005



References

- Nature of Work:** SPG has completed the first phase of a multiple phased study to determine the viability of a civic center in Melbourne, FL. As part of the study, SPG evaluated the operations of the existing Melbourne Auditorium to determine its suitability for expansion. Based on the market analysis, it was determined that the existing facility was not suitable for further expansion and the recommendation was made to develop a new multi-use standalone facility that had the design capability for future expansion. Subsequent phases of the study will address the site evaluations, development costs, and operating policies of the proposed facility.
- Total Cost:** \$95,000
- Client:** City of Sarasota; St. Armands Circle BID; Newtown CRA
Entity: St. Armand's Circle Redevelopment Plan
Entity: Newtown CRA Market Study
Contact: Mr. David Smith
General Manager
Sarasota County Community Development Department
- Address:** 1565 First Street
Sarasota, FL 34236
- Telephone:** (941) 954-4195 (Office)
(941) 954-4179 (Fax)
- Email:** david.smith@sarasotagov.com
- Year Completed:** April 2008 - May 2009
- Nature of Work:** SPG was retained by the St. Armands Business Improvement District (BID) to develop an economic repositioning program for the city's historic and premier shopping district. At completion of this study - SPG was retained by the City and the Newtown CRA to prepare a market study for one of its' larger vacant parcels.
- Total Cost:** \$50,000 (both)
- Client:** City of Coconut Creek - Development Services
Entity: Workforce Housing Linkage Fee Program
Contact: Ms. Sheila Rose
Director, Development Services
- Address:** 4800 West Copans Road
Coconut Creek, FL 33068
- Telephone:** (954) 973-6756 (Office)
(954) 956-1424 (Fax)
- Email:** dstecko@coconutcreek.net
- Year Completed:** 2006 - Duration 4 Months
- Nature of Work:** SPG adopted a workforce Housing Linkage Program that was adopted by the City Council. SPG was the prime contractor - totally responsible for the Linkage Program.
- Total Cost:** \$50,000



BUSINESS & FINANCIAL REFERENCES

Client: Walton County Tourist Development
Entity: Beaches of South Walton
Contact: Mr. Sonny Mares
Executive Director
Address: 25777 US Highway 331, South
Santa Rosa Beach, FL 32459
Telephone: (850) 267-1216 (Office)
Email: smares@beachesofsouthwalton.com
Year Completed: 2006 - 2007
Nature of Work: SPG prepared a Tourism Economic Impact Analysis for the Walton County TDC.
Total Cost: \$50,000

Client: Jackson County Department of Community Development
Entity: Jackson County EAR, EAR based Amendments and Land Development Regulations
Contact: Ms. Joan Schairer
Director
Address: 4487 Lafayette Street
Marianna, FL 32448
Telephone: (850) 482-9637 (Office)
(850) 482-9846 Fax
Email: director@jacksoncountyfl.com
Year Completed: 2007 - Current (ongoing)
Nature of Work: SPG in conjunction with Genesis Group, Inc. prepared the county's EAR and are currently working on developing the county's EAR based amendments as well as the county's first Land Development Regulations.
Total Cost: \$120,000

Client: South Rome Redevelopment
Entity: The South Rome Redevelopment Plan
Contact: Mr. Roman Herrington (Mr. Herrington served as the Client; he is now Executive Director in Meridian Mississippi)
Executive Director
Address: P.O. Box 865
Meridian, MS 39302-0865
Telephone: (601) 696-3035 (Office)
(601) 696-3037 (Fax)
Email: roman@cfem.org
Year Completed: 2005 - 2006
Nature of Work: SPG developed all of the demographic economics and affordable housing components of the redevelopment plan as well as CIP and funding sources. SPG was involved in the entire participation process.
Total Cost: \$70,000

Client: Palm Beach County Housing & Community Development
Entity: City Government
Contact: Mr. Carlos Serrano



References

- Address:** Senior Planner
160 Australian Avenue, Suite 500
West Palm Beach, FL 33406
- Telephone:** (561) 233-3608 (Office)
(561) 233-3651 (Fax)
- Email:** cserrano@co.palm-beach.fl.us
- Year Completed:** 2006-2007
- Nature of Work:** Prepared two major studies:
1. Palm Beach County Affordable Housing Analysis
 2. Palm Beach County Workforce Housing Analysis
 - ♦ Defined separately the needs for Affordable Housing and the needs for Workforce Housing
 - ♦ Provided a detailed analysis for 18 housing sectors within the county
 - ♦ Defined need by Income group
 - ♦ Defined project needs for 15 years out
 - ♦ Defined Supply Characteristics current and projected
 - ♦ Determined the GAP between Housing Price and Household Income by Income Group
 - ♦ Defined needs for both Ownership and Rental Housing
 - ♦ Defined needs for Elderly and Handicapped by geographic area
 - ♦ Constructed Affordability Development Model
- Total Cost:** \$100,000 (both)
-
- Client:** St. John's County
- Entity:** St. John's County EAR / Affordable Housing
- Contact:** Mr. Thomas A. Crawford
Executive Director
- Address:** 102 Martin Luther King Blvd., Suite B
St. Augustine, FL 32084
- Telephone:** (904) 827-6891 (Office)
(904) 827-6899 (Fax)
- Email:** tcrawford@sjcfl.us
- Year Completed:** 2002 - 2001 - Ongoing (2 special studies)
- Nature of Work:** SPG prepared Two Housing Studies
1. Special Needs Housing Study in 2001
 2. Affordable Housing Study in 2002
- Total Cost:** \$50,000 (both)
-
- Client:** Hall County Government
- Entity:** Hall County Affordable Housing Program
- Contact:** Ms. Jenise A. Proctor, M.A.
Grants Manager
- Address:** 116 Spring Street
Gainesville, GA 30503
- Telephone:** (770) 297-5503 (Office)



References

Email: (770) 531-6711 (Fax)
jproctor@hallcounty.org
Year Completed: 2008
Nature of Work: SPG prepared the County's Affordable Housing Program
Total Cost: \$50,000

Client: Jacksonville Economic Development Commission
Entity: The Downtown Jacksonville Initial Action Program
Contact: Mr. Joseph Whitaker
Director, Business Development Division
Address: One West Adams Street
Suite 200
Jacksonville, FL 32202
Telephone: (904) 630-1858 (Office)
(904) 630-1485 (Fax)
Email: josephw@coj.net
Year Completed: 2002 - 2001
Nature of Work: SPG prepared the City's Downtown Redevelopment Program; the Downtown Parking Study; and the Downtown Retail Study.
Total Cost: \$120,000 (all three)



WORDS FROM OUR CLIENTS

“SPG leadership and staff was impressive on both a professional and personal level. Their ability to apply economic theory to real-world issues was outstanding, and their technical expertise in data collection and analysis was unparalleled. Furthermore, it was a pleasure to work with a team that was so responsive to its clients and focused on customer needs. SPG delivered a product that will prove crucial in helping shape local housing policies and that will serve our community well into the future.” *Senior Planner, PBC Housing & Community Development, 2007*

“SPG’s greatest assets have been their responsiveness and commitment to produce a quality, saleable project...they have appeared with us in dozens of project meetings, well beyond that contemplated in our original contract. Also, they have done so without complaint or limitation. They have stressed the ‘sales’ aspect of the plan, i.e. producing a realistic plan that the City Council will adopt and be acceptable to all sectors of the downtown community. Their approach to the plan, using charrettes, was innovative and assured this final accountability.” *Downtown Development Authority, Jacksonville*

“The purpose of this letter is ...to let others know how happy the City of Jacksonville is with Strategic Planning Group, Inc., and its role in assisting the First Coast Region of Florida, in its economic development efforts.” *Economic Development Coordinator, Jacksonville, Florida*

“This letter is to let you and others who might be interested know that the ‘Economic Development and Targeted Industry Study for the Withlacoochee Service Delivery Area’ has been well received and is being continuously utilized. After its release, we had to do two reprints, and I still receive occasional requests for copies...We are pleased with both the product and the methods used to develop it.” *JTPA Program Director, Withlacoochee Private Industry Council, Inc.*

“The Florida Economic Development Council (FEDC) gave the Citrus County IDA a Superior Award in the Literature and Promotion category for our ‘Economic Development Profile’...the Economic Profile was produced by SPG ...We appreciate SPG’s involvement in this effort and look forward to working with you again.” *Executive Director, Citrus County Industrial Development Authority*

“I just wanted to drop you a note to tell you how much I appreciate the services you performed for the Economic Development Council here in Clay County...you guys did a great job and I sincerely appreciate it as well as members of the Development Authority and Committee of 100.” *Executive Director Clay County Economic Development Authority.*

“Kingston Restoration Company, Ltd. Is delighted to present the following testimonial on the work of the Strategic Planning Group, Inc. in assisting Kingston (Jamaica) to regain its former pride of place as a center for growth and economic development in the Caribbean.the Strategic Planning Group, Inc was contracted by the KRC to produce a plan titled Vision 2020 in order to provide a common vision for the future for Kingston’s development. The plan has been accepted and to today the City of Kingston is benefiting from the results of a number of key recommendations...

- ♦ Establishment of a Downtown Management District (DMD)
- ♦ A 25% Investment Tax Credit
- ♦ 10 Year tax free on Interest earned for rental downtown
- ♦ A tax free Bond
- ♦ Complete the Extension of Ocean Boulevard
- ♦ Development Corridor System
- ♦ Sabina Park
- ♦ Major improvements to King and Duke Streets-main downtown corridors



WORDS FROM OUR CLIENTS (CONTINUED)

"Greater than One Billion J\$ in investments has come into downtown Kingston." *Executive Director, Kingston Jamaica Restoration Company (funded by USAID).*

"I would like to take this opportunity to extend my sincerest appreciation for your involvement with the development of the Downtown Master Plan ...I was most impressed with both the creativity and feasibility of the recommendations." *Mayor Jacksonville, Florida*

"The City of Maitland is very pleased to be working on its Economic Element with your firm ...Once again, it has been a pleasure working with you and your firm." *Director of Community Development and Planning Services, City of Maitland, Florida.*

"Please accept the sincere thanks and appreciation of the Bureau of Economic Research for the critical work that the Strategic Planning Group, Inc performed in regards to production of the USVI Overall Economic Development Plan.....You and your staff are to be congratulated for a job well done. SPG always came through 'in the clutch' and never balked at any of our special requests or suggestions." *Director Bureau of Economic Research, The Virgin Islands of the United States.*

"For over two years the Strategic Planning Group, Inc has served Clay County as our principal consultant for the Comprehensive Plan, Economic Development Plan and various other land planning projects. During this time, we have found the quality of work, cooperation of entire staff to be of the highest degree and communication." *Director Planning Division, Clay County, Florida*

"Your report is detailed, well documented and contains a wealth of verified, pertinent data. Very simply, it is thoroughly professional product which you provided for us at a very fair cost." *St. Augustine/ St. Johns County Chamber of Commerce and Committee of 100.*

"We appreciated the expert guidance and technical expertise you and your associates have provided us....I found the firm's public presentations particularly valuable in the City of Apopka's planning process." *Community Development Director, City of Apopka.*

"Just a note to let you know that our State Board of Missions had a very positive response to the 'State Offices Relocation Study' which you prepared. One of our most knowledgeable members – a regional planner for over 20 years-complimented the report on its professional presentation, thoroughness and very helpful conclusions." *APR/Director Florida Baptist Convention.*

"This letter is to give notification of and recommendation to the use of the Strategic Planning Group, Inc... all required work as proposed in the contract was done on schedule and was within the contracted price. Also, it should be noted that the firm was responsive to any questions that arose during the project and that all conflicts were resolved easily and with a minimum of time and effort." *Director Planning and Zoning Division, City of Plant City*

"I would like to take this opportunity to thank you for the work you have done for the City. Other projects you have completed with and for the City have been of excellent quality, and I have found your work product to be of great benefit to City staff and the City Council in addressing our regional transportation needs and goals. I look forward to working with you again on this or any other regional transportation project here in the Antelope Valley." *City Manager, City of Palmdale.*

"I am writing to tell you how pleased Landon Management, Inc. is with the results of the Omni Center Retail Feasibility Study...In the future, as our need for real estate economic studies arise, SPG will be our first choice." *Vice President Landon Management.*



WORDS FROM OUR CLIENTS (CONTINUED)

“Let me reiterate what I said to each of the media, and that is that you succeeded in pulling the various elements together into a cohesive and responsive unit. You are to be congratulated, not just by the Port Authority but by all parties.” *Managing Director, Jacksonville Port Authority*

“Let me share some information about the Strategic Planning Group, Inc of Jacksonville. This organization assisted us as we worked our way through the strategic planning process....we were in search of a consulting group that could assist us....we were able to identify at least eight firms across the country...in the end the one company that met all our criteria, including reasonable cost, was Strategic Planning Group, Inc. We have completed three projects with SPG including the strategic planning process. Their professional work ethic, their well-conceived approach to the tasks have never disappointed us. I would without hesitation, recommend Strategic Planning Group for your consideration if you plan to undertake strategic planning, facility relocation or management assessment.” *Executive Director-Treasurer, Florida Baptist Convention*

“The Plan presents a viable mechanism for the physical and economic renewal of the City’s central business district that is compatible with the objectives of those who participated in the redevelopment program. Your knowledge of redevelopment alternatives has greatly aided the Community Redevelopment Agency to foster community support of the master plan..” *Chairman City of Vero Beach Redevelopment Agency*

“Your suggestions about the ‘Southern Riviera’ and the I-10 strategy and the many other tourism issues we discussed have been most insightful. We are indeed fortunate and honored to have the opportunity to work with such talented, skilled, experienced, creative, practical professionals.” *Chairman Panama City Beach Chamber of Commerce*

“Strategic Planning Group prepared Affordable and Workforce Housing Studies on behalf of Palm Beach County at a unique time in our housing market. SPG leadership and staff was impressive on both a professional and personal level. Their ability to apply economic theory to real-world issues was outstanding, and their technical expertise in data collection and analysis was unparalleled. Furthermore, it was a pleasure to work with a team that was so responsive to its clients and focused on customer needs. SPG delivered a product that will prove crucial in helping shape local housing policies and that will serve our community well into the future.” *Senior Planner, PBC Housing & Community Development*




TAB 4

Required Forms

Sumter County
ECONOMIC DEVELOPMENT MARKETING AND PROGRAM SUPPORT

PART 4
PROPOSALS DOCUMENTS

PROPOSALS COVER PAGE

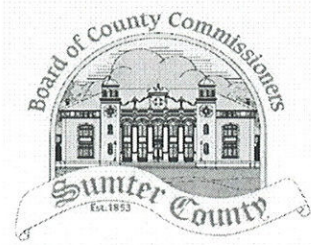
| | |
|--|---------------------------------------|
| Name of Firm, Entity or Organization: | <u>Strategic Planning Group, Inc.</u> |
| Federal Employer Identification Number (FEIN): <u>59-2353641</u> | |
| State of Florida License Number (If Applicable): | |
| Name of Contact Person: | <u>Robert J. Gray, AICP</u> |
| Title: | <u>Chairman and President</u> |
| E-Mail Address: | <u>rgray@spginc.org</u> |
| Mailing Address: <u>818 N A1A, Suite 303</u> | |
| Street Address (if different): | |
| City, State, Zip: <u>Ponte Vedra Beach, FL 32082</u> | |
| Telephone: (904) 339-0150 Fax: (904) 339-0151 | |
| Organizational Structure – Please Check One: | |
| Corporation <input checked="" type="checkbox"/> Partnership <input type="checkbox"/> Proprietorship <input type="checkbox"/> Joint Venture <input type="checkbox"/> Other <input type="checkbox"/> | |
| If Corporation: | |
| Date of Incorporation: <u>October 1983</u> State of Incorporation: <u>Florida</u> | |
| States Registered in as Foreign Corporation: | |
| Authorized Signature: | |
| Print Name: <u>Robert J. Gray</u> | |
| Signature: <u></u> | |
| Title: <u>Chairman and President</u> | |
| Phone: <u>(904) 339-0150 or (800) 213 PLAN</u> | |
| <i>This document must be completed and returned with your Submittal.</i> | |

Sumter County
ECONOMIC DEVELOPMENT MARKETING AND PROGRAM SUPPORT
PROPOSER'S CERTIFICATION

| | | | |
|--|--------------------------|--|--|
| Submit To: Sumter County Board of County Commissioners 910 North Main Street Bushnell, Florida, 33513 Phone 352-793-0200 Fax 352-793.0207 | | SUMTER COUNTY BOARD OF COUNTY COMMISSIONERS REQUEST FOR PROPOSALS (RFP) CERTIFICATION AND ADDENDA ACKNOWLEDGMENT | |
| DUE DATE: SEPTEMBER 18, 2009 | DUE TIME: 2:00 pm | RFP # E1-2009/AT | |
| TITLE: RFP # E1-2009/AT ECONOMIC DEVELOPMENT MARKETING AND PROGRAM SUPPORT | | | |
| VENDOR NAME: Strategic Planning Group, Inc | | PHONE NUMBER: (904) 339-0150 or (800) 213- PLAN | |
| VENDOR MAILING ADDRESS: 818 N A1A, Suite 303 | | FAX NUMBER: (904) 339-0151 | |
| CITY/STATE/ZIP: Ponte Vedra Beach, FL 32082 | | E-MAIL ADDRESS: rgray@spginc.org | |
| <p>"I, the undersigned, certify that I have reviewed the addenda listed below (list all addenda received to date). I understand that timely commencement will be considered in award of this RFP and that cancellation of award will be considered if commencement time is not met, and that untimely commencement may be cause for termination of contract. I further certify that the services will meet or exceed the RFP requirements. I, the undersigned, declare that I have carefully examined the RFP, specifications, terms and conditions as applicable for this Request, and that I am thoroughly familiar with all provisions and the quality and type of coverage and services specified. I further declare that I have not divulged, discussed, or compared this RFP with any other Offeror and have not colluded with any Offerors or parties to an RFP whatsoever for any fraudulent purpose."</p> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> <div style="text-align: center;"> <u>1</u> Addendum # </div> <div style="text-align: center;"> <u>2</u> Addendum # </div> <div style="text-align: center;"> _____ Addendum # </div> <div style="text-align: center;"> _____ Addendum # </div> <div style="text-align: center;"> _____ Addendum # </div> </div> | | | |
| <p>"I certify that this quote is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting an RFP for the same material, supplies, equipment or services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this RFP and certify that I am authorized to sign this response and that the offer is in compliance with all requirements of the RFP, including but not limited to certification requirements. In conducting offers with an agency for Sumter County Board of County Commissioners (BOCC), respondent agrees that if this Proposals is accepted, the respondent will convey, sell, assign, or transfer to the Sumter County BOCC all rights, title and interest in and to all causes of action it may now or hereafter acquire under the anti-trust laws of the United States for price fixing relating to the particular commodities or services purchased or acquired by the COUNTY. At the Sumter County BOCC discretion, such assignment shall be made and become effective at the time the purchasing agency renders final payment to the respondent."</p> <div style="display: flex; justify-content: space-between; margin-top: 20px;"> <div style="width: 40%;"> _____ Robert J Gray Authorized Agent Name, Title (Print) </div> <div style="width: 30%; text-align: center;">  _____ Authorized Signature </div> <div style="width: 20%; text-align: right;"> 9/10/09 _____ Date </div> </div> | | | |
| <i>This form must be completed and returned with your Submittal</i> | | | |

Sumter County
ECONOMIC DEVELOPMENT MARKETING AND PROGRAM SUPPORT

PROPOSALS FORM FOR
BOARD OF SUMTER COUNTY COMMISSIONERS



Name of Firm Submitting Qualifications Strategic Planning Group, Inc.

Name of Person Submitting Qualifications Robert J. Gray, AICP

PROPOSER ACKNOWLEDGMENT

"The undersigned hereby declares that he/she has informed himself/herself fully in regard to all conditions to the work to be done, and that he/she has examined the RFP and Specifications for the work and comments hereto attached. The Vendor proposes and agrees, if this submission is accepted, to contract with the Board of Sumter County Commissioners, to furnish all necessary materials, equipment, labor and services necessary to complete the work covered by the RFP and Contract Documents for this Project. The Vendor agrees to accept in full compensation for each item the prices named in the schedules incorporated herein."

CONSULTANT'S FEE SCHEDULE MUST BE ATTACHED TO THIS PROPOSAL



Signature

September 10, 2009

Date

[☐] Check if exception(s) or deviation(s) to Specifications. Attach separate sheet(s) detailing reason and type for the exception or deviation.

This document must be completed and returned with your Submittal



Billing Rates

Professional Fees

Per Hour

| | | |
|-------------------------------------|-------|-------|
| Project Officer | \$150 | \$175 |
| Project Manager | \$100 | \$150 |
| Senior Managing Director | \$95 | \$110 |
| Associate VP | \$90 | \$100 |
| Senior Planner | \$85 | \$100 |
| Planner | \$75 | \$90 |
| Market Analyst | \$60 | \$85 |
| Urban Designer | \$85 | \$120 |
| GIS | \$75 | \$100 |
| Analysis | \$50 | \$75 |
| Word Processing/Document Production | \$45 | \$65 |

Expert Witness \$2,000 day

Sumter County

ECONOMIC DEVELOPMENT MARKETING AND PROGRAM SUPPORT

STATEMENT OF TERMS AND CONDITIONS

PUBLIC ENTITY CRIME: A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a Proposal/Bid on a contract to provide any goods or services to a public entity, for the construction or repair of a public building or public work, may not submit Proposals/Bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

INDEMNIFICATION: The Contractor agrees to indemnify and hold harmless Board of Sumter County Commissioners, and their elected officials, employees and volunteers from and against all claims, losses and expenses, including legal costs, arising out of or resulting from, the performance of this contract, provided that any such claims, damage, loss of expenses is attributed to bodily injury, sickness, disease, personal injury or death, or to injury to or destruction of tangible property including the loss or loss of use resulting there from and is caused in whole or in part by any negligent act or omission of the tenant.

PROHIBITION OF LOBBYING: During the black out period which is, the period between the time the submittals for Invitation to Bid or the Request for Proposals, or Qualifications, or information, as applicable, are received at Contracts / Purchasing and the time the Board awards the contract, no proposer, no lobbyist, principal, or other person may lobby, on behalf of a competing party in a particular procurement matter, any member of the Board, or any Board employee other than the Budget & Purchasing Manager. Violation of this provision may result in disqualification of violating party. All questions regarding this Request for Proposals (RFP) or Invitation to Bid (BID) must be submitted in writing to the Board's Budget & Purchasing Manager.

ANTI TRUST LAWS: By submission of a signed RFP or BID, the successful Vendor acknowledges compliance with all antitrust laws of the United States and the State of Florida, in order to protect the public from restraint of trade, which illegally increases prices.

CONFLICT OF INTEREST: The award of the contract hereunder is subject to the provisions of Chapter 112 of the Florida Statutes. Vendors shall disclose the name of any Officer, Director, Partner, Associate, or Agent who is also an Officer, Appointee, or Employee of any of the Boards at the time of the RFP or BID, or at the time of occurrence of the Conflict of Interest thereafter.

INTERPRETATION, CLARIFICATIONS AND ADDENDA: No oral interpretations will be made to any vendor as to the meaning of the RFP/BID Contract Documents. Any inquiry or request for interpretation received by the Budget & Purchasing Manager before the date listed herein will be given consideration. All such changes or interpretations will be made in writing in the form of an addendum and, if issued, will be distributed at or after the Pre-Proposals/Pre-Bid Conference, mailed or sent by available or electronic means to all attending prospective Submitters prior to the established RFP/BID opening date. Each Vendor shall acknowledge receipt of such addenda in the space provided. In case any Proposer/Bidder fails to acknowledge receipt of such addenda or addendum, his offer will nevertheless be construed as though it had been received and acknowledged and the submission of his bid will constitute acknowledgment of the receipt of same. All addenda are a part of the RFP/BID FORMS and each Proposer/Bidder will be bound by such addenda, whether or not received by him. It is the responsibility of each proposer/bidder to verify that he has received all addenda issued before RFP's/BID's are opened. In the case of unit price items, the quantities of work to be done and materials to be furnished under this RFP/BID Contract are to be considered as approximate only and are to be used solely for the comparison of RFP's/BID's received. The Board and/or his CONSULTANT do not expressly or by implication represent that the actual quantities involved will correspond exactly therewith; nor shall the Vendor plead misunderstanding or deception because of such estimate or quantities of work performed or material furnished in accordance with the Specifications and/or Drawings and other Proposals/Bid Documents, and it is understood that the quantities may be increased or diminished as provided herein without in any way invalidating any of the unit or lump sum prices bid.

GOVERNING LAWS AND REGULATIONS: The vendor is required to be familiar with and shall be responsible for complying with all federal, state and local laws, ordinances, rules and regulations that in any manner affect the work.

PROPRIETARY/CONFIDENTIAL INFORMATION: Vendors are hereby notified that all information submitted as part of, or in support of RFP's/BID's, will be available for public inspection ten days after opening of the RFP's/BID's or until a short list is recommended whichever comes first, in compliance with Chapter 119, and 287 of the Florida Statutes. Any person wishing to view the RFP's/BID's must make an appointment by calling the Budget & Purchasing Manager at (352) 793-0200. All RFP's/BID's submitted in response to this solicitation become the property of the Board. Unless information submitted is proprietary, copy written, trademarked, or patented, the Board reserves the right to utilize any or all information, ideas, conceptions, or portions of any RFP/BID, in its best interest.

TAXES: The Board of Sumter County Commissioners is exempt from any taxes imposed by the State and/or Federal Government. Exemption certificates will be provided upon request.

NON-COLLUSION DECLARATION: By signing this RFP/BID, all Vendors shall affirm that they shall not collude, conspire, connive or agree, directly or indirectly, with any other Proposer, firm, or person to submit a collusive or sham Proposal in connection with the work for which their RFP/BID has been submitted; or to refrain from Bidding in connection with such work; or have in any manner, directly or indirectly, sought by person to fix the price or prices in the RFP/BID or of any other Bidder, or to fix any overhead, profit, or cost elements of the RFP/BID price or the RFP/BID price of any other Bidder, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against any other Bidder, or any person interested in the proposed work.

PROPOSER RESPONSIBILITY: Invitation by the Boards to vendors is based on the recipient's specific request and application to DemandStar by Onvia at www.DemandStar.com [(800) 711-1712] or as the result of response by the public to the legal advertisements required by State law. Firms or individuals submit their responses on a voluntary basis, and therefore are not entitled to compensation of any kind.

OWNERSHIP OF SUBMITTALS: All responses, inquiries or correspondence relating to or in reference to this RFP/BID, and all other reports, charts, displays, schedules, exhibits and other documentation submitted by the vendors will become the property of the Board. Reference to literature submitted with a previous RFP/BID will not relieve the Bidder from including any required documents with this RFP/BID.

EXAMINATION OF BID DOCUMENTS: Each Bidder shall carefully examine the RFP/BID Document to ensure all pages have been received, all drawings and/or Specifications and other applicable documents are included, and shall inform himself thoroughly regarding any and all conditions and requirements that may in any manner affect cost, progress or performance of the work to be performed under the Contract. Ignorance on the part of the CONTRACTOR will in no way relieve him of the obligations and responsibilities assumed under the Contract.

VENDOR RESPONSIBILITY: Vendors are fully and completely responsible for the labeling, identification and delivery of their submittals. The Budget & Purchasing Manager will not be responsible for any mislabeled or misdirected submissions, nor those handled by delivery persons, couriers, or the US Postal Service.

DRUG FREE WORKPLACE: All Proposers/Bidders shall submit the enclosed, duly signed and notarized form entitled "Drug Free Workplace Certificate". The Drug Free Workplace Vendor shall have the burden of demonstrating that his program complies with Section 287.087 of the Florida Statutes, and any other applicable state law.

BOARD OF SUMTER COUNTY COMMISSIONERS, are political subdivisions of the State of Florida, and reserve the right to reject any and/or all submittals, reserve the right to waive any informalities or irregularities in the examination process, and reserve the right to award contracts and/or in the best interest of the Boards. Submittals not meeting stated minimum terms and qualifications may be rejected by the Boards as non-responsive. The Boards reserve the right to reject any or all submittals without cause. The Boards reserves the right to reject the submission of any Vendor in arrears or in default upon any debt or contract to the Boards, or who has failed to perform faithfully any previous contract with the Boards or with other governmental agencies.

PUBLIC RECORDS LAW: Correspondence, materials and documents received pursuant to this RFP/BID become public records subject to the provisions of Chapter 119, Florida Statutes.

VERIFICATION OF TIME: Nextel time is hereby established as the Official Time of the Boards.

PREPARATION OF PROPOSALS/BIDS:

Signature of the Bidder: The Bidder must sign the RFP/BID FORMS in the space provided for the signature. If the Proposer/Bidder is an individual, the words "doing business as _____" must appear beneath such signature. In the case of a partnership, the signature of at least one of the partners must follow the firm name and the words, "Member of the Firm" should be written beneath such signature. If the Proposer/Bidder is a corporation, the title of the officer signing the RFP/BID on behalf of the corporation must be stated and evidence of his authority to sign the RFP/BID must be submitted. The Proposer/Bidder shall state in the RFP/BID FORMS the name and address of each person interested therein.

Basis for Bidding: The price proposed for each item shall be on a lump sum or unit price basis according to specifications on the RFP/BID FORM. The proposed prices shall remain unchanged for the duration of the Contract and no claims for cost escalation during the progress of the work will be considered, unless otherwise provided herein.

Total Proposed Price/Total Contract Sum Proposed: If applicable, the total price bid for the work shall be the aggregate of the lump sum prices proposed and/or unit prices multiplied by the appropriate estimated quantities for the individual items and shall be stated in figures in the appropriate place on the RFP/BID FORM. In the event that there is a discrepancy on the RFP/BID FORM due to unit price extensions or additions, the corrected extensions and additions shall be used to determine the project bid amount.

TABULATION: Those wishing to receive an official tabulation of the results of the opening of this RFP/BID are to submit a self-addressed, stamped business size (No. 10) envelope, prominently marked on the front lower left side, with the RFP identification. Tabulation requested by telephone, fax or electronic media will not be accepted.

OBLIGATION OF WINNING BIDDER: The contents of the RFP/BID of the successful proposer/bidder will become contractual obligations if acquisition action ensues. Failure of the successful Proposer/Bidder to accept these obligations in a contract may result in cancellation of the award and such vendor may be removed from future participation.

AWARD OF BID: It is the Boards' intent to select a vendor within sixty (60) calendar days of the deadline for receipt of Proposals/Bids. However, Proposals/Bids must be firm and valid for award for at least ninety (90) calendar days after the deadline for receipt of the RFP/BID.

ADDITIONAL REQUIREMENTS: The firms shall furnish such additional information as the Boards may reasonably require. This includes information which indicates financial resources as well as ability to provide the services. The Boards reserve the right to make investigations of the qualifications of the firm as it deems appropriate.

PREPARATION COSTS: The Boards shall not be obligated or be liable for any costs incurred by Proposers/Bidders prior to issuance of a contract. All costs to prepare and submit a response to this RFP/BID shall be borne by the Proposer/Bidder.

TIMELINESS: All work will commence upon authorization from the Boards' representative (Budget & Purchasing Manager). All work will proceed in a timely manner without delays. The Contractor shall commence the work UPON RECEIPT OF NOTICE TO PROCEED and/or ORDER PLACED (PURCHASE ORDER PRESENTED), and shall deliver in accordance to the terms and conditions outlined and agreed upon herein.

DELIVERY: All prices shall be FOB Destination, The Villages, Florida, inside delivery unless otherwise specified.

ADDITIONAL SERVICES/PURCHASES BY OTHER PUBLIC AGENCIES ("PIGGY-BACK"):

The Vendor by submitting a Bid acknowledges that other Public Agencies may seek to "Piggy-Back" under the same terms and conditions, during the effective period of any resulting contract – services and/or purchases being offered in this Bid, for the same prices and/or terms proposed. Vendor has the option to agree or disagree to allow contract Piggy-Backs on a case-by-case basis. Before a Public Agency is allowed to Piggy-Back any contract, the Agency must first obtain the vendor's approval – without the vendor's approval, the seeking Agency cannot Piggy-Back.

PLANS, FORMS & SPECIFICATIONS: Bid Packages are available from the Budget & Purchasing Manager. These packages are available for pickup or by mail. If requested to mail, the Proposer/Bidder must supply a courier account number (UPS, FedEx, etc). Proposers/Bidders are required to use the official RFP/BID FORMS, and all attachments itemized herein, are to be submitted as a single document. Any variation from the minimum specifications must be clearly stated on the RFP/BID FORM and/or Exceptions/Deviations Sheet(s). Only one set of plans, forms, and specifications will be furnished each company or corporation interested in submitting a Proposal/Bid. RFP/BID FORM documents for this project are free of charge and are available on-line and are downloadable (vendor must pay any DemandStar fees or any shipping).


MANUFACTURER'S NAME AND APPROVED EQUIVALENTS: Any manufacturer's names, trade names, brand names, information and/or catalog numbers listed in a specification are for information and not intended to limit competition unless otherwise indicated. The Proposer/Bidder may offer any brand for which he is an authorized representative, which meets or exceeds the RFP/BID specification for any item(s). If RFP's/BID's are based on equivalent products, indicate on the RFP/BID FORM the manufacturer's product name and literature, and/or complete specifications. Reference to literature submitted with a previous RFP/BID will not satisfy this provision. The Proposer/Bidder shall explain in detail the reason(s) why the proposed equivalent will meet the specifications and not be considered an exception thereto. RFP's/BID's which do not comply with these requirements are subject to rejection. RFP's/BID's lacking any written indication of intent to quote an alternate brand will be received and considered in complete compliance with the specifications as listed on the RFP/BID FORM. The Budget & Purchasing Manager is to be notified, in writing, of any proposed changes in materials used, manufacturing process, or construction. However, changes shall not be binding upon the Boards unless evidenced by a Change Notice issued and signed by the Budget & Purchasing Manager, or designated representative.

QUANTITIES: The quantities as specified in this RFP/BID are estimates only and are not to be construed as guaranteed minimums.

SAMPLES: Samples of items, when called for, shall be furnished free of expense, and if not destroyed may, upon request, be returned at the Proposer's/Bidder's expense. Each sample shall be labeled with the Proposer's/Bidder's name, manufacturer brand name and number, RFP/BID number and item reference. Samples of successful Proposer's/Bidder's items may remain on file for the term of the contract. Request for return of samples shall be accompanied by instructions which include shipping authorization and must be received at time of opening. Samples not returned may be disposed of by the Boards within a reasonable time as deemed appropriate.

DOCUMENT RE-CREATION: Vendor may choose to re-create any document(s) required for this solicitation, but must do so at his own risk. All required information in the original Board format must be included in any re-created document. Submittals may be deemed non-responsive if required information is not included in any re-created document.

ACKNOWLEDGED:


(Signature and Date)
9/11/09

This document must be completed and returned with your Submittal



Sumter County ECONOMIC DEVELOPMENT MARKETING AND PROGRAM SUPPORT REFERENCE & SIMILAR PROJECTS EXPERIENCE FORM

| | | |
|---|-----------------------|---------------------------------------|
| Owner / Business Name: City of Ormond Beach | | |
| Project Location / Address: 22 South Beach Street | | |
| City: Ormond Beach | State: Florida | Zip Code: 32175 |
| Point of Contact: Joe Mannarino | | Dates of Work: 2002 to present |
| Phone Number: 386-676-3266 | | Fax Number: (386) 676-3330 |
| E-mail Address: mannarino@ormondbeach.org | | |
| Project Name: Economic Development Strategic Plan, Fiscal Impact Studies, Redevelopment Planning | | |
| Brief Description of Project: SPG has been assisting the City for over six years in their economic development and redevelopment efforts | | |

| | | |
|--|------------------|-----------------------------------|
| Owner / Business Name: Jacksonville Economic Development Commission (DUVAL County) | | |
| Project Location / Address: One West Adams Street, Ste 200 | | |
| City: Jacksonville | State: FL | Zip Code 32202 |
| Point of Contact: Joe Whitaker | | Dates of Work: 1980s-2006 |
| Phone Number: (904) 630-1858 | | Fax Number: (904) 630-1485 |
| E-mail Address: josephw@coj.net | | |
| Project Name: Numerous Projects: First Coast Bio-Medical Economic Targeting Study, Initial Downtown Action Plan, Downtown Retail Study, Downtown Parking Study, Port Master Plan, Mayo Clinic Site Selection study, etc. | | |
| Brief Description of Project: SPG and staff have been involved in over a dozen studies for the City/County and Chamber of Commerce over the years including the Bio Medical Economic Development Program, the Port Master Plan, Mayo Clinic Site Selection study, Initial Action Plan for Downtown and numerous Military and private sector siting studies. | | |

| | | |
|---|-----------------------|------------------------------|
| Owner / Business Name: Walton County BOCC and TDC | | |
| Project Location / Address: 25777 US Highway 331, South | | |
| City: Santa Rosa Beach | State: Florida | Zip Code: 32459 |
| Point of Contact: Sonny Mares | | Dates of Work: 2007-8 |
| Phone Number: 850 267-1216 | | Fax Number: |
| E-mail Address: smares@beachesofsouthwalton.com | | |
| Project Name: Walton County Economic Impact Study | | |
| Brief Description of Project: SPG prepared a economic and fiscal impact study of the County's tourism and how it impacts all other sectors of the County's economic fabric | | |

Sumter County
ECONOMIC DEVELOPMENT MARKETING AND PROGRAM SUPPORT

CONTRACTOR'S AFFIDAVIT

State of Florida

County of St. Johns County

Before me personally appeared Robert J Gray who is (title) President of (the company described herein) _____ being duly sworn, deposes and say that the foregoing statements are a true and accurate statement of the position of said organization as of the date thereof, and, that the statements and answers to the foregoing experience questionnaire are correct and true as of the date of this affidavit; and, that he/she understands that intentional inclusion of false, deceptive, or fraudulent statements of this application constitutes fraud; and, agrees to furnish any pertinent information requested by The Sumter County Board of County Commissioner deemed necessary to verify the statements made in this application or regarding the ability, standing and general reputation of the applicant.

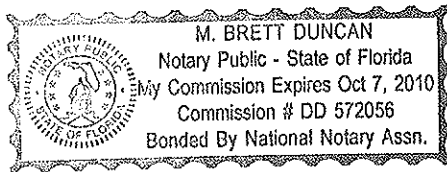
Personally Known _____ or Produced Identification FL DL

Sworn to and subscribed before me this 10th day of Sept., 2009

M. Brett Duncan
NOTARY PUBLIC - STATE OF FLORIDA
(Signature of Notary Public)

M. Brett Duncan
(Print Name of Notary Public)

(seal)



This document must be completed and returned with your Submittal

Sumter County
ECONOMIC DEVELOPMENT MARKETING AND PROGRAM SUPPORT

DRUG FREE WORKPLACE CERTIFICATE

I, the undersigned, in accordance with Florida Statute 287.087, hereby certify that,

Strategic Planning Group, Inc.
(print or type name of firm)

- Publishes a written statement notifying that the unlawful manufacture, distribution, dispensing, possession or use of a controlled substance is prohibited in the workplace named above, and specifying actions that will be taken against violations of such prohibition.
- Informs employees about the dangers of drug abuse in the work place, the firm's policy of maintaining a drug free working environment, and available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug use violations.
- Gives each employee engaged in providing commodities or contractual services that are under Proposals or bid, a copy of the statement specified above.
- Notifies the employees that as a condition of working on the commodities or contractual services that are under Proposals or bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, please or guilty or nolo contendere to, any violation of Chapter 1893, or of any controlled substance law of the State of Florida or the United States, for a violation occurring in the work place, no later than five (5) days after such conviction, and requires employees to sign copies of such written (*) statement to acknowledge their receipt.
- Imposes a sanction on, or requires the satisfactory participation in, a drug abuse assistance or rehabilitation program, if such is available in the employee's community, by any employee who is so convicted.
- Makes a good faith effort to continue to maintain a drug free work place through the implementation of the drug free workplace program.
- "As a person authorized to sign this statement, I certify that the above named business, firm or corporation complies fully with the requirements set forth herein".

Robert J Gray, AICP



Authorized Signature

9/10/2009

Date Signed

State of: Florida

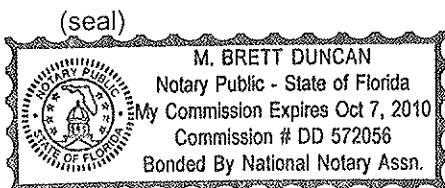
County of: ST JOHN'S

Sworn to and subscribed before me this 10th day of Sept, 2009

Personally known _____ or Produced Identification FL DL
(Specify Type of Identification)

M. Brett Duncan
Signature of Notary

My Commission Expires 10/7/10





STATEMENT OF INSURANCE COMPLIANCE

The undersigned agrees to obtain prior to award, if selected, Professional Liability, General Liability, Automobile Liability, and Worker's Compensation coverages in accordance with the requirements as set forth in the Invitation for Proposal, Invitation to Bid, or Invitation for Qualifications, or draft agreement, attached hereto.

Policies other than State Issued Worker's Compensation shall be issued only by companies authorized by maintaining certificates of authority issued to the companies by the Department of Insurance of the State of Florida to conduct business in the State of Florida and which maintain a Rating of "A" or better and a Financial Size category of "VII" or better according to the A.M. Best Company. Policies for Worker's Compensation may be issued by companies authorized as a group self-insurer by F.S. 440.57, Florida Statutes.

Robert J. Gray

PROPOSER/BIDDER

AUTHORIZED SIGNATURE

Chairman & President

OFFICER TITLE

September 11, 2009

DATE

THIS FORM MUST BE COMPLETED AND RETURNED WITH YOUR PROPOSAL.

END OF SECTION



County Required Forms

Example Only - Proof of Insurability Only

CERTIFICATE OF GENERAL AND WORKER'S COMPENSATION LI- ABILITY INSURANCE

| ACORD - CERTIFICATE OF LIABILITY INSURANCE | | DATE (MM/DD/YYYY) | | | |
|--|---|-------------------|---------------------------------------|--|--|
| PRODUCER Leatzow & Associates, Inc. 415 Taft Avenue, 2nd Floor Glen Ellyn, IL 60137 | | 03/27/2007 | | | |
| INSURED Strategic Planning Group, Inc. 2453 South Third Street Costa Verde Place Jacksonville Beach, FL 32250 | | | | | |
| COVERAGE THIS IS TO CERTIFY THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. MONTHLY PREMIUMS MAY BE DEDUCTED FROM THE POLICY CONTRACT OR ANY CONTRACT FOR OR NEW DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN. THE POLICIES AFFORDED BY THE POLICIES DESCRIBED HEREIN ARE SUBJECT TO ALL THE TERMS, EXCLUSIONS, LIMITS, COINSURANCE, OR SUCH POLICIES. LIMITS 2-10 MAY HAVE BEEN PROVIDED BY PRIOR CLAIMS. | | | | | |
| CO LTR | TYPE OF INSURANCE | POLICY NUMBER | POLICY EFFECTIVE DATE (MM/DD/YYYY) | POLICY EXPIRATION DATE (MM/DD/YYYY) | LIMITS |
| A | GENERAL LIABILITY <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input checked="" type="checkbox"/> PRODUCTS/COMPLETED OPERATIONS <input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> NON-OWNED AUTOMOBILE LIABILITY <input type="checkbox"/> EXCESS/UMBRELLA LIABILITY | 2063433006 | 05/07/2006 | 05/07/2007 | EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 2,000,000 AUTOMOBILE LIABILITY \$ 1,000,000 NON-OWNED AUTOMOBILE LIABILITY \$ 1,000,000 EXCESS/UMBRELLA LIABILITY \$ 1,000,000 |
| B | WORKER'S COMPENSATION AND EMPLOYERS LIABILITY <input type="checkbox"/> EMPLOYERS LIABILITY <input type="checkbox"/> WORKER'S COMPENSATION <input type="checkbox"/> EXCESS/UMBRELLA LIABILITY | 21WECG0184 | 08/19/2006 | 08/19/2007 | EACH OCCURRENCE \$ 100,000 AGGREGATE \$ 200,000 EXCESS/UMBRELLA LIABILITY \$ 200,000 |
| DESCRIPTION OF OPERATIONS, LOCATIONS, VEHICLES, SPECIAL ITEMS | | | | | |
| CERTIFICATE HOLDER Genesis Group Attn: Lynn Racin 9250 Cypress Green Drive Suite 200 Jacksonville, FL 32256 | | | | | |
| CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING COMPANY WILL NOTIFICATION TO THE LEFT. IF CANCELLATION IS REQUIRED, THE ISSUING COMPANY SHALL ADVISE THE CERTIFICATE HOLDER BY MAIL. BUT FAILURE TO MAIL SUCH NOTICE SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE CERTIFICATE HOLDER OR REPRESENTATIVE. | | | | | |
| ACORD 25 (03/01/06) FAX: (904) 730-7165 ACORD CORPORATION 1988 | | | | | |

| ACORD - CERTIFICATE OF LIABILITY INSURANCE | | DATE (MM/DD/YYYY) | | | |
|--|---|-------------------|---------------------------------------|--|--|
| PRODUCER Leatzow & Associates, Inc. 415 Taft Avenue, 2nd Floor Glen Ellyn, IL 60137 | | 03/27/2007 | | | |
| INSURED Strategic Planning Group, Inc. 2453 South Third Street Costa Verde Place Jacksonville Beach, FL 32250 | | | | | |
| COVERAGE THIS IS TO CERTIFY THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. MONTHLY PREMIUMS MAY BE DEDUCTED FROM THE POLICY CONTRACT OR ANY CONTRACT FOR OR NEW DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN. THE POLICIES AFFORDED BY THE POLICIES DESCRIBED HEREIN ARE SUBJECT TO ALL THE TERMS, EXCLUSIONS, LIMITS, COINSURANCE, OR SUCH POLICIES. LIMITS 2-10 MAY HAVE BEEN PROVIDED BY PRIOR CLAIMS. | | | | | |
| CO LTR | TYPE OF INSURANCE | POLICY NUMBER | POLICY EFFECTIVE DATE (MM/DD/YYYY) | POLICY EXPIRATION DATE (MM/DD/YYYY) | LIMITS |
| A | GENERAL LIABILITY <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input checked="" type="checkbox"/> PRODUCTS/COMPLETED OPERATIONS <input type="checkbox"/> AUTOMOBILE LIABILITY <input type="checkbox"/> NON-OWNED AUTOMOBILE LIABILITY <input type="checkbox"/> EXCESS/UMBRELLA LIABILITY | 002773038 | 8/31/2005 | 8/31/2006 | EACH OCCURRENCE \$ 1,000,000 AGGREGATE \$ 1,000,000 |
| DESCRIPTION OF OPERATIONS, LOCATIONS, VEHICLES, SPECIAL ITEMS | | | | | |
| CERTIFICATE HOLDER Strategic Planning Group, Inc. 2453 South Third Street Costa Verde Place Jacksonville Beach, FL 32250 | | | | | |
| CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING COMPANY WILL NOTIFICATION TO THE LEFT. IF CANCELLATION IS REQUIRED, THE ISSUING COMPANY SHALL ADVISE THE CERTIFICATE HOLDER BY MAIL. BUT FAILURE TO MAIL SUCH NOTICE SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE CERTIFICATE HOLDER OR REPRESENTATIVE. | | | | | |
| ACORD 25 (03/01/06) FAX: (904) 730-7165 ACORD CORPORATION 1988 | | | | | |

CERTIFICATE OF PROFESSIONAL LIABILITY INSURANCE

SPG maintains full insurance coverage and upon selection it will name Oviedo, FL on its' various insurance policies.